

# NAED Allied Partner Company Profiles

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This document is designed to help NAED member distributors better understand who NAED Allied Partners are, what problems their solutions help address, and where those capabilities may fit within the modern distribution enterprise.

Electrical distribution is entering a period of rapid operational and technological change. New tools and platforms are emerging across supply chain visibility, digital commerce, sales execution, pricing, warehouse operations, automation, and data management. As a result, distributors are increasingly exposed to a growing number of technology providers, consulting firms, and service organizations offering solutions aimed at improving different parts of the business.

While innovation is accelerating, navigating the solution landscape has become more complex. Distributors are often forced to evaluate solutions through individual vendor conversations, marketing materials, or conference interactions that do not always provide a clear picture of how different capabilities compare or where they fit operationally.

This guide was created to provide structure and context to that environment.

Each profile highlights what a company does, the distributor problems its solutions help address, and the types of roles within a distribution organization that typically evaluate or lead these initiatives.

This document is not intended to serve as an endorsement list. It is a decision-support resource intended to:

- Help distributors identify solution categories relevant to their current priorities
- Accelerate education and peer discussions around emerging technologies and proven practices
- Provide clearer context for where different partner capabilities may align with operational, commercial, or strategic goals
- Support more informed conversations at NAED events, workshops, and peer forums

The value to members lies in structure and context. Instead of navigating dozens of disconnected vendor conversations, this guide presents NAED Allied Partners in a consistent format that helps distributors quickly understand what each organization does and how it may contribute to solving specific business challenges.

When a distributor identifies a company worth exploring further, a recommended next step is a conversation with the NAED Digital Center of Excellence to clarify scope, readiness, stakeholder alignment, and evaluation priorities before a formal introduction. The objective is not to accelerate purchasing decisions. It is to improve decision quality.

For additional insight or a deeper conversation about any of these technology partners, feel free to reach out. I am always glad to help distributors think through the use cases they are trying to solve, clarify where a solution may fit, and support a more informed evaluation process.

Thank you,

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## Alexander Group — Commercial Strategy, Compensation & Benchmarking Consulting

Website: <https://www.alexandergroup.com/>

### Executive Summary

Alexander Group is a revenue growth management consulting firm focused on improving commercial performance across go-to-market functions. In product discussions, the primary fit for distributors surfaced around support relating to sales deployment and effectiveness, sales compensation, go-to-market benchmarking, and research-driven guidance. They partner with organizations to help leadership teams diagnose performance gaps, align roles and incentives with strategic growth objectives, and make better decisions using a data-driven approach and structured advisory support.

For distributors, Alexander Group is most useful when the challenge is not a tool selection problem, but a commercial operating model problem: customer segmentation, role clarity, sales productivity, compensation design, KPI selection, or broader GTM effectiveness. The Alexander Group's data-driven approach is rooted in its extensive research and practical real-world experience. Additionally, the Alexander Group provides its community with access to events (webinars, briefings) and research.

Distributor evaluation should focus on the specific operational pain points the organization is trying to improve (such as sales comp plans not aligned to strategy or changing roles; weak visibility into commercial productivity and cost benchmarks; unclear KPIs for sales effectiveness and leadership accountability), whether the internal capabilities match the required expertise needed to drive the change needed. Best for distributors/manufacturers with enough scale to justify benchmark-driven commercial redesign), along with integration requirements, implementation approach, and the level of change management needed for adoption.

### Solutions / Capabilities for Distributors

- Go-to-market consulting across sales, marketing, service and revenue leadership
- Go-to-market redesign including customer segmentation, coverage, and job roles
- Commercial analytics / benchmarking to compare productivity, costs, coverage and headcount ratios
- Sales compensation design, plan assessment, benchmarking and governance support
- Executive events, briefings and research content that can support distribution education programming

### Distributor Problems They Address

- Difficulty prioritizing commercial investments without peer-based evidence
- Need to improve GTM execution without guessing
- Weak visibility into commercial productivity and cost benchmarks
- Falling short of revenue growth objectives
- Sales comp plans not aligned to strategy or changing roles
- Unclear KPIs for sales effectiveness and leadership accountability

### Where They Fit / Best Use Cases

- Primary buyers: Sales leadership, commercial executives, revenue operations, finance/HR (comp), executive teams
- Best for distributors/manufacturers with enough scale to justify benchmark-driven commercial redesign
- Strong distribution fit in research briefings, webinars, and strategy sessions rather than booth-centric engagement

## Americaneagle.com — Full-Service B2B Digital Agency for Ecommerce Implementation, Strategy, and Digital Marketing

Website: <https://www.americaneagle.com/>

### Executive Summary

Americaneagle.com is a full-service digital agency that designs, builds, and supports digital experiences, including ecommerce, web development, digital marketing, hosting/managed services, and AI consulting. The agency has successfully partnered with NAED members for B2B ecommerce strategy, implementation, and digital marketing.

For distributors, Americaneagle.com can help with platform selection, storefront design/build, integrations, catalog/taxonomy work, optimization, and ongoing support. That becomes especially relevant for members aiming to modernize ecommerce without disrupting sales relationships or creating internal resistance. Product discussions around AI fears and commission concerns are important. Americaneagle.com has cultivated a wide range of experience across industries, accelerating ecommerce success in both customer and internal team adoption.

Platform and technology partnerships are integral to their excellent client track record. Some of their many solutions partners include Oro Commerce, ROC Commerce, BigCommerce, Shopify, Shopware, Adobe, HubSpot, and Salesforce.

### **Solutions / Capabilities for Distributors**

- Web and application development, UX/design
- Digital marketing
- Hosting and managed cloud services
- B2B ecommerce strategy
- Platform Implementation
- Tech stack (ERP/PIM/CRM/etc.) integration
- Multi-Site, Multi-Language
- Post-launch support, solution training
- AI consulting

### **Distributor Problems They Address**

- Revenue Growth: Low online conversion, Weak cross-sell/upsell capability, Poor customer retention through digital channels
- Operational Efficiency: Manual order handling, Duplicate data entry across systems, Heavy customer service dependency, Customer Experience, Hard-to-use portals, Slow product discovery, Inconsistent account experiences
- Technology Modernization: Legacy infrastructure, Integration bottlenecks, Limited flexibility for future digital initiatives, Internal teams needing implementation support plus post-launch enablement, Change-management and friction related to ecommerce and AI adoption

### **Where They Fit / Best Use Cases**

- Platform Proficiencies: Oro Commerce, ROC Commerce, BigCommerce, Shopify, Shopware, Adobe, HubSpot, Salesforce
- Primary buyers: Digital/ecommerce leaders, IT, marketing, sales leadership, customer experience teams
- Ecommerce solutions with complex ERP/CRM/PIM/payment/shipping integrations
- Best for distributors planning ecommerce modernization, replatforming, or performance optimization

## **Avalon CSC — Supply Chain & Warehouse Consulting / Managed Improvement**

Website: <https://avaloncsc.com/>

### **Executive Summary**

Avalon CSC is a supply chain consulting partner focused on practical, operations-driven improvement across warehousing, inventory, and logistics. Their value is rooted in hands-on execution, measurable outcomes, and disciplined change management, not a software-led pitch. For distributors, the strongest fit is helping translate strategy into operational improvements that are realistic, measurable, and sustainable.

Avalon appears especially relevant for distributors working through warehouse modernization, process redesign, inventory and planning improvement, WMS readiness, or post-implementation stabilization. Their positioning is strongest where a distributor needs operational expertise, floor-level assessment, KPI discipline, and ongoing support to help improvements take hold over time, rather than simply receiving recommendations.

### **Solutions / Capabilities for Distributors**

- Supply chain strategy and network design, including distribution network optimization and 3PL evaluation and integration
- Planning and inventory optimization, including data-driven decision support, inventory policy design, and process improvement
- Warehouse operations consulting, including layout, flow, productivity, and space utilization improvement, along with technology assessment and enablement
- Operational assessments, including benchmarking, performance diagnostics, and roadmap development
- Managed services for ongoing KPI monitoring, optimization, and continuous improvement support

### **Distributor Problems They Address**

- Inefficient warehouse operations, poor flow, and space constraints
- Weak inventory discipline and inconsistent purchasing processes
- Underperforming WMS or operational initiatives caused by adoption and change-management gaps
- Limited KPI visibility and lack of post-implementation performance tracking
- Broader challenges tied to operational modernization and scaling

### **Where They Fit / Best Use Cases**

- Best fit for mid-to-large market distributors seeking pragmatic, execution-focused improvement
- Relevant for organizations integrating or expanding warehouse automation
- Strong fit for distributors undergoing warehouse modernization or process redesign
- Useful for businesses preparing for, or stabilizing after, WMS implementations
- Well suited for teams that need structured change management and operational alignment

- Primary buyers include operations leadership, warehouse management, supply chain executives, inventory and purchasing leaders, and executive sponsors
- Best use cases include warehouse transformation and layout optimization, inventory and planning process improvement, network design and distribution strategy refinement, and operational assessment or continuous improvement programs

## BigCommerce — B2B eCommerce Platform

Website: <https://www.bigcommerce.com/>

### Executive Summary

BigCommerce is a commerce platform provider with a strong B2B positioning for manufacturers and distributors, and the conversation with BigCommerce points to a broader strategic relationship opportunity with distribution. The immediate value in product discussions is a platform-plus-ecosystem approach that can help distributors address ecommerce, data/catalog, and quoting/RFQ challenges without forcing a closed stack.

For distributors, BigCommerce can help modernize digital commerce with B2B-specific account structures, pricing/catalog controls, quoting, reordering, and integration-friendly architecture. Just as important, product discussions highlight their ecosystem strategy with agency and technology partners, which matters in distribution because success usually depends on the combination of platform, implementation partner, and data/integration execution. This makes BigCommerce relevant not only as a software platform, but as a coordination point in broader ecommerce transformation discussions.

Product discussions covered strengthening partnership through BigCommerce's Association and Buying Groups Program and in-person alignment at the Austin event. Evaluation conversations also emphasized measurable outcomes and proof points, integration scope and system-of-record alignment, implementation approach and time-to-value.

Public website materials highlight how the company positions its B2B platform directly for manufacturers and distributors and emphasizes unified B2B experiences across brands, regions, and buyer types; B2B Edition pages highlight customer groups, multi-company hierarchy, multi-storefront, CPQ, buyer roles/permissions, sales-team tools, reordering, and payment/invoice workflow controls; BigCommerce also emphasizes pre-built integrations, API-first architecture, and access to B2B-specialized agencies/partners to speed implementation and ROI.

Distributor evaluation should focus on the specific operational pain points the organization is trying to improve (such as fragmented or outdated distributor ecommerce experiences; one-size-fits-all pricing/catalogs that do not reflect customer-specific terms; manual quoting and reorder workflows slowing digital adoption), whether the available capabilities match the required workflow scope (including B2B ecommerce platform capabilities for manufacturers/distributors (account structures, pricing/catalog controls, buyer workflows); Multi-storefront and localization support for brands/regions/customer types; CPQ / quote-oriented B2B experiences and sales-team workflow support), stakeholder ownership and process fit (for example, Primary buyers: Ecommerce/digital leadership, IT, sales operations, marketing, executive sponsors; Best for distributors modernizing B2B ecommerce or replatforming with partner-led implementation), along with integration requirements, implementation approach, and the level of change management needed for adoption.

### Solutions / Capabilities for Distributors

- B2B ecommerce platform capabilities for manufacturers/distributors (account structures, pricing/catalog controls, buyer workflows)
- Multi-storefront and localization support for brands/regions/customer types
- CPQ / quote-oriented B2B experiences and sales-team workflow support
- API-first / integration-friendly architecture with partner ecosystem support
- Association/buying-group partnership model that can package member benefits and strategic collaboration

### Distributor Problems They Address

- Fragmented or outdated distributor ecommerce experiences
- One-size-fits-all pricing/catalogs that do not reflect customer-specific terms
- Manual quoting and reorder workflows slowing digital adoption
- Difficulty scaling across regions/brands/storefronts from a unified backend
- Need for open architecture that works with integrators and adjacent tools

### Where They Fit / Best Use Cases

- Primary buyers: Ecommerce/digital leadership, IT, sales operations, marketing, executive sponsors
- Best for distributors modernizing B2B ecommerce or replatforming with partner-led implementation

# BlueVolt — Learning Management System for Channel Industries

Website: <https://www.bluevolt.com>

## Executive Summary

BlueVolt is a learning management system (LMS) purpose-built for the trades and industrial distribution channels, including electrical, HVAC, plumbing, construction, and MRO. Unlike general-purpose LMS platforms built for internal training only, BlueVolt supports both workforce development and external channel training, helping distributors onboard employees, build product knowledge, and access training content directly from their suppliers.

A defining capability is the BlueVolt Sharing Center, a course-sharing network connecting over 1.2 million learners, where manufacturers publish product training that distributor employees can access directly. Distributors joining the platform can draw on existing supplier content rather than building a training library from scratch.

BlueVolt's value centers on structured onboarding, scalable product knowledge delivery, and organization-wide training visibility. It is a dedicated training platform rather than a broader HR or talent management system. Results are strongest when distributors commit consistent time to the platform, typically one to two hours per week, with a clear goal and an internal champion driving engagement.

## Solutions / Capabilities for Distributors

- Branded training environment for building and managing internal programs across branches and roles
- Access to supplier-published product training through the BlueVolt Sharing Center, alongside a broader course library covering professional development, safety, and compliance content from third-party publishers
- Customizable onboarding tracks and learning curricula tailored to job role, department, or experience level
- An AI-powered course creation tool, allowing distributors to build courses from existing materials like PowerPoints and PDFs in days rather than months, without needing technical or instructional design expertise
- Reporting and analytics dashboards tracking enrollments, completions, and engagement across the organization
- Accessible from any mobile browser, supporting counter staff, field employees, and branch personnel without requiring a dedicated app
- BlueVolt CE University provides continuing education for licensed electricians; through the CE Manager program, distributors can purchase credits in bulk, giving organizations a centralized way to manage CE requirements for their electrician employees and field staff
- API and SSO integrations connecting BlueVolt with existing HR, CRM, and enterprise systems
- AI features including AI course recommendations for learners, AI course search for administrators, and a mix of AI and human support for both learners and admins
- Note: Some capabilities including the course library, API and SSO integrations, and AI course creation access are available as add-ons. BlueVolt can provide details on what is included in core platform access.

## Distributor Problems They Address

- Onboarding that is inconsistent, informal, or dependent on institutional knowledge from experienced staff
- Counter and inside sales staff lacking current product knowledge across a broad supplier line card
- No centralized way to manage and track CE requirements for licensed electricians across the organization
- No scalable way to deliver and track supplier product training across multiple branches or locations
- Overreliance on manufacturer rep visits or in-person events for product education
- Knowledge loss from turnover with no structured system to rebuild product and process expertise
- Limited visibility into who has been trained, on what, and to what level of completion

## Where They Fit / Best Use Cases

- Primary buyers: HR, operations, and branch leadership at distributors with structured or growing training needs
- Scales across organization sizes, from distributors formalizing training for the first time to larger operations managing multi-branch consistency
- Best fit for distributors with an internal champion who are ready to engage the platform on a regular basis; organizations looking for a set-it-and-forget-it solution are unlikely to see strong results
- Especially valuable when key suppliers are already active on the BlueVolt network; BlueVolt will conduct complimentary supplier outreach on behalf of any organization on the platform at any time, with messaging reviewed and approved by the organization before any contact is made
- Strong fit for distributors using training as a retention tool in a high-turnover environment, where regular platform engagement is a shared trait among their strongest-performing customers

## Bridgeline — AI Search, Product Discovery & Merchandising

Website: <https://www.bridgeline.com/>

### Executive Summary

Bridgeline's relevant distribution fit is primarily through HawkSearch, their AI-powered search, merchandising, and personalization platform used in B2B ecommerce environments. Based on product discussions, their value to distributors centers on solving high-friction product discovery problems that are common in electrical distribution: part-number search behavior, unit-of-measure variation, entitlement complexity, multi-location availability, and merchandising control across large catalogs.

For distributors, HawkSearch can help improve digital product discovery for both customers and internal sales teams by delivering more accurate search, better relevance, and stronger merchandising controls. The demo discussion also suggests a broader strategic relevance: as customer-facing ecommerce and internal sales workflows converge, tools like HawkSearch could support a more unified experience. Bridgeline also appears to understand a crawl-walk-run adoption path, which aligns with the industry philosophy.

Product discussions covered distribution event strategy and setting realistic expectations for where allied partners can access the right distributor audiences. Evaluation conversations also emphasized adoption and change-management considerations, workflow-specific demos or pilot validation, integration scope and system-of-record alignment.

Public website materials highlight how the company positions the product around revenue impact through better search, merchandising, and personalization (traffic, conversion, AOV); HawkSearch site pages and industry content explicitly call out B2B features such as entitlements and unit-of-measure conversion—both highly relevant to electrical distribution; Recent Bridgeline/HawkSearch announcements highlight distributor and wholesale use cases, multi-site deployments, and AI search/discovery capabilities (concept/image/visual/hybrid search).

Distributor evaluation should focus on the specific operational pain points the organization is trying to improve (such as poor on-site search causing abandoned sessions, support burden, and lost sales; part-number complexity, formatting errors, and unit-of-measure mismatches in industrial/electrical catalogs; customer entitlement and location-specific availability rules that native search handles poorly), whether the available capabilities match the required workflow scope (including HawkSearch platform for AI-powered search, product discovery, merchandising, and personalization; B2B-oriented search capabilities including part/SKU handling, entitlements, filtering, and relevance controls; Multi-site product discovery support for distributed/multi-brand ecommerce environments), stakeholder ownership and process fit (for example, Primary buyers: Ecommerce/digital teams, IT, marketing/merchandising, sales operations, customer experience leaders; Best for distributors with large catalogs, branch networks, complex product data, and serious digital commerce goals), along with integration requirements, implementation approach, and the level of change management needed for adoption.

### Solutions / Capabilities for Distributors

- HawkSearch platform for AI-powered search, product discovery, merchandising, and personalization
- B2B-oriented search capabilities including part/SKU handling, entitlements, filtering, and relevance controls
- Multi-site product discovery support for distributed/multi-brand ecommerce environments
- AI features including concept/image/visual search and smart responses/assistive capabilities
- Integrations with major commerce platforms and digital ecosystems (including BigCommerce and others)

### Distributor Problems They Address

- Poor on-site search causing abandoned sessions, support burden, and lost sales
- Part-number complexity, formatting errors, and unit-of-measure mismatches in industrial/electrical catalogs
- Customer entitlement and location-specific availability rules that native search handles poorly
- Merchandising teams lacking control over relevance, promotions, and product ranking
- Large/multi-site catalogs needing centralized control with localized buying experiences

### Where They Fit / Best Use Cases

- Primary buyers: Ecommerce/digital teams, IT, marketing/merchandising, sales operations, customer experience leaders
- Best for distributors with large catalogs, branch networks, complex product data, and serious digital commerce goals
- Distribution fit is strongest through targeted digital/ecommerce forums, demos for the right audience, and content collaboration—not broad regional booth expectations

## Calusa Marketing — Customer Loyalty & Engagement Programs

Website: <https://calusamarketing.com/>

### Executive Summary

Calusa Marketing provides loyalty, incentives, and promotional engagement programs that help distributors run customer and channel programs without significant technical lift.

For distributors, the value is less about a traditional marketing agency relationship and more about an operationally simple engagement platform that supports retention, repeat purchases, and targeted outreach. Public website materials highlight loyalty and incentive offerings including customer loyalty programs, channel incentives, employee rewards, gift card fulfillment, merchandise rewards, and incentive travel.

**Products & Services:** In product discussions, the primary distributor offering was their points-based rewards platform, which allows distributors to run structured incentive and engagement programs for customers, channel partners, or employees. Participants can redeem points across a wide range of reward options, including travel bookings, event tickets (sporting events, concerts, and amusement parks), gift cards, Apple and Bass Pro Shop/Cabela's storefront rewards, more than 150,000 merchandise items, and concierge-supported redemption services. Program structure can be tailored to the distributor's strategic needs (such as YoY sales growth, brand loyalty, or E-commerce).

Complementing the rewards platform is Calusa's digital wallet-based loyalty card, which supports simple punch-style programs designed primarily for counter customers. The card can be branded for the distributor, delivered through Apple Wallet or Google Wallet via QR code, text, or link, and managed through a lightweight web interface for issuing punches and sending communications. This provides distributors with a low-barrier program that can support counter traffic while the broader rewards platform supports engagement programs aimed at contractor owners and key customer relationships. Messaging emphasizes ease of deployment, no required app downloads, minimal integration requirements, and rapid implementation timelines.

Calusa also offers incentive travel programs, including both group trips and individual travel packages. Individual travel programs are typically structured for two people and can often be designed with little or no upfront financial commitment, allowing distributors to use travel incentives for sales promotions, customer engagement campaigns, or event participation programs.

Distributor evaluation should focus on the specific operational pain points the organization is trying to improve (such as replacing paper punch cards or manual loyalty tracking, improving customer engagement and retention, or launching a loyalty program quickly without app development or heavy system integration), whether the available capabilities match the required workflow scope, and how the program fits operational ownership across marketing, branch operations, and sales leadership.

### Solutions / Capabilities for Distributors

- Points-based rewards platform with redemption options including travel bookings, event tickets, gift cards, merchandise rewards, and concierge services
- Digital loyalty card programs delivered to Apple Wallet / Google Wallet for end users
- Branded loyalty and punch programs for distributors (single-site or multi-location)
- Mobile wallet-based member communication and push notifications, including geofencing options
- Gift card fulfillment, merchandise rewards, and incentive program support (customer, channel, employee)
- Incentive travel programs including group trips and individual travel packages
- Program design and administration support with reporting and customer service

### Distributor Problems They Address

- Difficulty running structured incentive or rewards programs without dedicated marketing infrastructure
- Paper punch cards or manual loyalty tracking that are hard to manage and easy to abuse
- Low customer engagement/retention because outreach is inconsistent or not targeted
- Limited visibility into who is participating and how program rewards are being issued
- Distributor marketing teams needing a practical engagement program, not a custom technology build

### Where They Fit / Best Use Cases

- Primary buyers: Marketing, branch operations, sales leadership, customer experience teams
- Best fit for distributors wanting a branded loyalty or rewards program with minimal IT dependency
- Counter traffic loyalty programs combined with broader rewards programs aimed at contractor owners and key accounts
- Branch traffic campaigns, customer retention initiatives, and distributor-led marketing programs
- Sales incentives, customer engagement campaigns, and event or meeting attendance programs

## Canals.ai — AI Quote & Order Workflow Automation

Website: <https://www.canals.ai/>

### Executive Summary

Canals.ai is positioned as an AI workflow automation provider built specifically for distribution, with a strong emphasis on turning messy customer requests into quotes and orders that reps can review and push into the ERP quickly. The core distributor value proposition is speed-to-answer and throughput improvement without forcing customers to change how they submit requests (emails, PDFs, spreadsheets, handwritten notes, takeoffs, and more).

From product discussions, Canals stands out not just because of product interest, but because member interest and conference engagement suggest strong market interest. Product discussions also show a useful strategic dynamic: you are not just evaluating one opportunity to increase efficiency with AI, but actively pressure-testing where Canals could help expand next (especially accounting and purchasing-side use cases) based on recurring industry pain.

Evaluation conversations also emphasized integration scope and system-of-record alignment, electrical-distribution use cases, implementation approach and time-to-value.

Public website materials highlight how the company positions itself as the 'end-to-end Operating AI with automations spanning sales order entry, inquiry handling, accounts payable, accounts receivable, and PO-to-receipt tracking workflows; Distributor Order Entry content highlights handling requests in many formats, support across inside/counter/outside sales, and AI that learns customer preferences and captures institutional knowledge across users; The site advertises ERP integrations for major systems (including Eclipse, Prophet 21, Infor CSD/SX.e, SAP S/4HANA, and Microsoft Dynamics) and states common implementations can be completed in days with limited IT lift.

Distributor evaluation should focus on the specific operational pain points the organization is trying to improve (such as slow quote turnaround and manual order creation from emails/PDFs/spreadsheets/takeoffs; rep capacity constraints and inconsistent quoting quality across channels or experience levels; high returns/error rates due to poor item matching or inconsistent interpretation of requests), whether the available capabilities match the required workflow scope (including AI order entry / RFQ automation for distributors (quote and order creation from unstructured requests); AI workflows across sales, AP, purchasing/receiving, and part-number conversion; ERP-integrated automation that prepares transactions for review and submission), stakeholder ownership and process fit (for example, Primary buyers: Sales leadership, inside sales/CSR leaders, operations, IT/digital teams; Best fit where speed-to-quote, order-entry labor, and customer response consistency are pain points), along with integration requirements, implementation approach, and the level of change management needed for adoption.

### Solutions / Capabilities for Distributors

- Quote/RFQ Acceleration and Product Matching
- Automated Order Entry from Customer Documents
- Standard Customer Response Drafting
- Bid List and Takeoff Interpretation
- Sales Knowledge Copilot
- Internal Knowledge Copilot / Enterprise Q&A
- Order and Transaction Document Digitization
- AP/AR Document Processing and Exception Routing
- Inbound Shipment Visibility
- AI order entry / RFQ automation for distributors (quote and order creation from unstructured requests)
- AI workflows across sales, AP, purchasing/receiving, and part-number conversion
- ERP-integrated automation that prepares transactions for review and submission
- Machine-learning adaptation to rep behavior, customer preferences, and catalog/product patterns
- Customer success onboarding, training, and support for rollout and scaling

### Distributor Problems They Address

- Slow quote turnaround and manual order creation from emails/PDFs/spreadsheets/takeoffs
- Rep capacity constraints and inconsistent quoting quality across channels or experience levels
- High returns/error rates due to poor item matching or inconsistent interpretation of requests
- Difficulty scaling inside sales/counter sales productivity without adding headcount
- Need to modernize customer experience without forcing customers into portals or format changes

### Where They Fit / Best Use Cases

- Primary buyers: Sales leadership, inside sales/CSR leaders, operations, IT/digital teams
- Best fit where speed-to-quote, order-entry labor, and customer response consistency are pain points
- Also relevant in broader workflow automation conversations (AP, PO tracking, receiving) after an initial sales-order entry win

# Celerity — SPA & Rebate Reconciliation Automation

Website: <https://celerityenterprises.com/>

## Executive Summary

Celerity is an end-to-end Special Pricing Agreement (SPA) reconciliation platform focused on manufacturers, distributors, and rep agents. In plain terms, they are attacking one of the most painful financial/operational problems in electrical distribution: messy SPA data, slow reconciliation, claim disputes, delayed rebates, and manual work spread across pricing, sales ops, and finance. Product discussions consistently reinforce that Celerity's strength is not just automation rhetoric, but proof-oriented workflow improvement tied to rebate recovery, data quality, and speed. For distributors, Celerity can help by automating SPA ingestion, validation, and reconciliation while improving visibility into pricing/rebate activity and reducing the manual burden of claim cleanup. Just as important, product discussions show that Megan understands the adoption realities in distribution: executive sponsorship, IT/business alignment, low-friction deployment, and proving value early with real dollars recovered. That combination of product capability and change-management awareness appears to strengthen the company's positioning relative to typical vendor narratives.

Evaluation conversations also emphasized adoption and change-management considerations, data readiness and process/data quality requirements, measurable outcomes and proof points.

Public website materials highlight the platform as the industry's first end-to-end SPA reconciliation platform for manufacturers, distributors, and rep agents, with a single platform for initiating, reviewing, submitting, and receiving claims; Site feature pages emphasize full-scale automation, clean/accurate data formatted to manufacturer requirements, ease of integration across existing architectures/ERPs, and actionable insights/reporting; Distributor and manufacturer benefit pages reinforce outcomes around faster approvals, improved cash flow, fewer discrepancies, cleaner claims, and time redirected to higher-value work.

Distributor evaluation should focus on the specific operational pain points the organization is trying to improve (such as manual SPA/SPJ rebate processes (excel/PDF/email/EDI cleanup) consuming pricing and finance teams; claim rejections, disputes, and delayed rebate cash flow caused by bad upstream data; inconsistent manufacturer/distributor data formats and naming conventions slowing implementation), whether the available capabilities match the required workflow scope (including End-to-end SPA reconciliation platform connecting manufacturers, distributors, and rep agents; SPA data ingestion/transformation across multiple file formats with normalization/cleanup/validation; Claim accuracy improvements and reconciliation workflows to reduce disputes and delays), stakeholder ownership and process fit (for example, Primary buyers: Pricing/rebates teams, finance, sales ops, IT/integration leaders, distributor executives; Best fit for distributors/manufacturers with SPA complexity and costly manual reconciliation work), along with integration requirements, implementation approach, and the level of change management needed for adoption.

## Solutions / Capabilities for Distributors

- End-to-end SPA reconciliation platform connecting manufacturers, distributors, and rep agents
- SPA data ingestion/transformation across multiple file formats with normalization/cleanup/validation
- Claim accuracy improvements and reconciliation workflows to reduce disputes and delays
- Dashboards / reporting for financial visibility, margin decisions, and operational tracking
- Platform support for distributor and manufacturer workflows, including compliance checks and clean submissions

## Distributor Problems They Address

- Manual SPA/SPJ rebate processes (Excel/PDF/email/EDI cleanup and loading) consuming pricing and finance teams
- Claim rejections, disputes, and delayed rebate cash flow caused by missed or incomplete data, inaccurate data, mismatched pricing
- Inconsistent manufacturer/distributor data formats and naming conventions slowing implementation
- Limited visibility into rebate performance, claim status, and margin impact or margin opportunity
- Change resistance and cross-functional friction during implementation (business vs IT ownership)

## Where They Fit / Best Use Cases

- Primary buyers: Pricing/rebates teams, finance, sales ops, IT/integration leaders, distributor executives
- Best fit for distributors/manufacturers with SPA complexity and costly manual reconciliation work
- Strong use case where quick ROI can be shown through recovered claims, faster cycle times, and lower admin effort

# Conexiom — Order Document Automation & Touchless Processing

Website: <https://conexiom.com/>

## Executive Summary

Conexiom is an intelligent sales order automation platform built for manufacturers and distributors, focused on turning emailed and file-based customer orders into clean, corrected and validated ERP-ready data while reducing manual entry and preventing downstream order issues. In product discussions, the strongest distributor fit is sales order automation at scale: capturing high volumes of customer orders in many formats, validating and correcting them before they enter the ERP, and applying business logic to standardize data without asking customers to change how they submit orders.

For distributors, Conexiom can help improve order speed, accuracy, and customer experience while freeing customer service and operations teams from repetitive order-entry work. Product discussions covered electrical distributor use cases and product differentiation, including recent updates to capabilities, AI processing of unstructured documents, and autonomous processing for high-volume, structured documents, and workflow-specific considerations such as integration scope, system-of-record alignment, and electrical distribution requirements.

Public website materials highlight Conexiom's platform approach to sales order automation: capture from virtually any format, extract and standardize order data with configurable logic, validate against ERP records, correct issues before they become costs, and increase the share of orders that can be processed with low/no manual review. Conexiom's CoreAI engine has been trained on over 1 billion order lines annually and emphasizes order capture accuracy, real-time validation, fast setup, and flexibility in allowing customers to order in any format without friction.

Distributor evaluation should focus on the specific operational pain points the organization is seeking to improve, such as manual order entry queues slowing customer response and increasing labor cost, order issues that create fulfillment problems, delays, and rework, and inconsistent customer order formats that create long-tail complexity. Evaluation should also assess whether the available capabilities match the required workflow scope, including AI-powered sales order automation across capture, standardization, validation, correction, and autonomous order processing, along with stakeholder ownership, process fit, integration requirements, implementation approach, and the level of change management needed for adoption.

## Solutions / Capabilities for Distributors

- AI-powered sales order automation across order capture, validation, correction, and ERP delivery
- Handling orders from many formats including email, PDF, Excel, CSV, text, images, and handwritten notes
- Validation and order correction workflows plus business logic before ERP entry
- Autonomous order processing for high-volume, structured orders where fully touchless execution is desired
- Hybrid automation approaches that combine AI-powered order capture with rules and governance to deliver reliable speed and accuracy at scale

## Distributor Problems They Address

- Manual order entry queues slowing customer response and increasing labor cost
- Order issues that create fulfillment problems, delays, rework and costs
- Inconsistent customer order formats and long-tail order complexity
- Multiple manual channel inputs including email, SFTP, eCommerce portals etc.
- Difficulty scaling order capacity without adding headcount
- Reliance on manual review and challenges in order processing consistency across high-volume environments

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## Continuum.ai — Returns, Warranty & Reverse Logistics Automation

Website: <https://gocontinuum.ai/>

### Executive Summary

Continuum.ai is positioned as a reverse-logistics and returns/warranty process platform focused on reducing manual work after the sale. In product discussions, the fit surfaced around returns management, supplier coordination, and end-to-end process improvement rather than front-end selling tools. The strongest value for distributors is operational: replacing email/spreadsheet-heavy RMA and warranty workflows with standardized, trackable processes.

For distributors, Continuum looks most relevant where returns, warranties, credits, and post-sale service friction are consuming labor and hurting customer experience. Product discussions also suggest an honest maturity signal: they appear to have examples in adjacent channels (including HVAC) and are still building deeper electrical-specific distributor/supplier proof points. That makes an education-first distribution approach the right strategy.

Product discussions covered returns management and reverse logistics, with discussion of distributor + supplier workflow possibilities and relevance to B2B eCommerce environments. Evaluation conversations also emphasized measurable outcomes and proof points, integration scope and system-of-record alignment, electrical-distribution use cases.

Public website materials highlight the platform around AI agents for returns, warranties, and repairs, explicitly targeting distributors and manufacturers; The site breaks capabilities into Customer, Warehouse, Vendor/Finance, and Manufacturer Warranty hubs, reinforcing a cross-functional operating model; Continuum emphasizes ERP/CRM/eCommerce connectivity and states the platform is designed to connect with major systems.

Distributor evaluation should focus on the specific operational pain points the organization is trying to improve (such as manual rma/warranty intake via email, spreadsheets, and repeated follow-up; returns slipping through the cracks due to weak ownership and poor cross-functional visibility; missed vendor credits and slow customer credit reconciliation hurting profitability and trust), whether the available capabilities match the required workflow scope (including AI-assisted returns and warranty processing workflows for distributors and manufacturers; Customer returns portal with status tracking and self-service intake for claims/returns; Workflow routing across customer service, warehouse, finance, and vendor/manufacturer touchpoints), stakeholder ownership and process fit (for example, Primary buyers: Operations, customer service leadership, warehouse leaders, finance/AR, IT; Best fit for distributors/manufacturers with recurring returns/warranty volume and multi-team handoffs), along with integration requirements, implementation approach, and the level of change management needed for adoption.

### Solutions / Capabilities for Distributors

- AI-assisted returns and warranty processing workflows for distributors and manufacturers
- Customer returns portal with status tracking and self-service intake for claims/returns
- Workflow routing across customer service, warehouse, finance, and vendor/manufacturer touchpoints
- Vendor-credit and customer-credit tracking to reduce missed credits and reconciliation delays
- ERP/CRM/eCommerce integrations and implementation support for reverse-logistics workflows

### Distributor Problems They Address

- Manual RMA/warranty intake via email, spreadsheets, and repeated follow-up
- Returns slipping through the cracks due to weak ownership and poor cross-functional visibility
- Missed vendor credits and slow customer credit reconciliation hurting profitability and trust
- Warehouse receiving inefficiency and inconsistent handling of returned goods
- Poor post-sale customer experience during returns/warranty events

### Where They Fit / Best Use Cases

- Primary buyers: Operations, customer service leadership, warehouse leaders, finance/AR, IT
- Best fit for distributors/manufacturers with recurring returns/warranty volume and multi-team handoffs
- Useful where the goal is to standardize post-sale workflows and improve customer experience without adding headcount

# DataXstream — SAP-Native OMS & Counter Sales Automation

Website: <https://www.dataxstream.com/sap-solutions/intelligent-automation-dataxstream/>

## Executive Summary

DataXstream provides SAP-native order management, point-of-sale, and intelligent automation solutions (OMS+ and OMS+IA) aimed at streamlining complex selling and order-entry workflows for distributors and other industries. In product discussions, the strongest differentiators repeatedly surfaced as deep SAP integration, a unified order execution layer that supports both DTC and distribution workflows, real-time transaction inside SAP, and a growing AI/automation layer for document processing, search, matching, and order-entry acceleration.

For distributors, DataXstream appears most valuable when the pain is front-line selling and order execution complexity inside SAP environments: counter sales, call center order entry, mobile sales, document ingestion, material matching, and search/UX improvement. Product discussions also show a nuanced view: this is a strong option for SAP shops, but the SAP-only positioning narrows fit outside that installed base. Within SAP distributors, however, the combination of embedded workflow, AI features, and distributor-specific process design looks compelling.

Product discussions focused on practical industry insights, including how distributors operate and adapt, as well as the ongoing evolution of OMS+, OMS+IA, and SAP-native AI capabilities for order management. Conversations around evaluation centered on what it takes to successfully adopt these solutions—highlighting change management, clear performance metrics, and proven results. Attendees also showed strong interest in seeing real-world applications through workflow-specific demos and pilot programs to validate value before full implementation.

Public website materials highlight OMS+ as a SAP-native order management and POS platform designed to transact in real time in SAP across channels; OMS+IA is presented as an intelligent automation suite using AI technologies (including OCR, NLP, ML, and LLM capabilities) for order-entry workflows; The OMS+ for Distributors pages emphasize unified commerce, distributor-specific selling workflows, faster implementation/time-to-value, and distributor-oriented capabilities such as advanced search, quoting/bidding, and returns features.

Distributor evaluation should focus on the specific operational pain points the organization is trying to improve (such as slow, manual order entry and long training ramps for counter/call-center sales teams; poor product/material search and matching when users lack exact part numbers; sap user experience friction and customization debt limiting speed and adoption), whether the available capabilities match the required workflow scope (including OMS+ SAP-native order management and POS platform for cross-channel sales execution in real time; OMS+ Intelligent Automation (OMS+IA) for document automation, AI chat functionality, order population, user-friendly search, and material matching; B2B customer portal, rental management, and unified commerce capabilities for distributor workflows), stakeholder ownership and process fit (for example, Primary buyers: IT, sales operations, customer service leadership, digital/eCommerce leaders, branch operations in SAP environments; Best fit for SAP-based distributors needing order-entry modernization, channel unification, and embedded AI automation), along with integration requirements, implementation approach, and the level of change management needed for adoption.

## Solutions / Capabilities for Distributors

- OMS+ SAP-native order management and POS platform for cross-channel sales execution in real time
- OMS+ Intelligent Automation (OMS+IA) for document automation, order population, user-friendly search, and material matching
- OMS+ Portal for customer B2B self-serve options
- OMS+ Rental for comprehensive rental management
- Unified commerce capabilities for distributor workflows
- Machine-learning/AI-assisted order-entry support including OCR/NLP/LLM-enabled processing within SAP-oriented workflows
- Distributor-focused UI/process modernization to reduce training time and improve adoption
- Industry specific features include:
  - Customer specific pricing
  - Advanced Material Search Capabilities
  - Configurable materials
  - BOMS and Kits
  - Comprehensive Inventory Availability
  - Material Creation On The Fly
  - External Catalog Integration
  - Cross Selling
  - Integrated Procurement Capabilities
  - Advanced Quoting and Bidding
  - Master Contract and Subcontract Management
  - Service Management
  - Mass Change Capability
  - Advanced Returns Management
  - Order Splitting
  - Advanced Payment Features
  - Hardware Integration

## Distributor Problems They Address

- Slow, manual order entry and long training ramps for counter/call-center sales teams
- Poor product/material search and matching when users lack exact part numbers
- SAP user experience friction and customization debt limiting speed and adoption
- Document-heavy quote/order intake processes that create delays and manual rework
- Change-management resistance when implementing new tools in sales/service environments
  - Inability to leverage next selling technologies due to legacy selling tools
  - Upgrade challenges going from ECC to S/4HANA
- Multiple legacy systems to support customer assisted selling
- Real-time reporting of sales
- Complexity within order processes, quoting processing and billing processes
- End of Day Counter Closing Time
- Selling Data Accuracy/ Data Synchronization

## Where They Fit / Best Use Cases

- Primary buyers: IT, sales operations, customer service leadership, digital/eCommerce leaders, branch operations in SAP environments
- Best fit for SAP-based distributors needing order-entry modernization, channel unification, and embedded AI automation
- Strong use cases include counter/call-center/mobile sales, document ingestion, intelligent search, and process standardization across channels

## DCKAP — Integration & Data Orchestration Middleware

Website: <https://www.dckap.com/>

### Executive Summary

DCKAP is best understood as an integration and orchestration platform company built for distributors and manufacturers, with DCKAP Integrator as a core product and DCKAP EDI as a complementary capability. In product discussions, their strongest distributor value proposition was flexibility: connecting ERPs, eCommerce, CRMs, WMS, and other systems without forcing distributors into a rip-and-replace or black-box architecture.

For distributors, DCKAP can help where the bottleneck is data movement, synchronization, visibility, and workflow orchestration—not just one application feature gap. Product discussions also highlight a practical fit for distributors trying to modernize in stages: start with targeted integrations or data-flow pain points, then expand into broader automation as confidence and ROI are proven.

Product discussions covered both partner engagement strategy and a deeper product walkthrough of DCKAP Integrator, including distribution-specific integration and orchestration use cases; how DCKAP can engage distribution effectively through educational content, case studies, and distributor-relevant proof instead of pitch-heavy event presence. Evaluation conversations also emphasized measurable outcomes and proof points, integration scope and system-of-record alignment.

Public website materials highlight how the company positions DCKAP Integrator as an ERP-first integration platform for distributors and highlights ERP/eCommerce/CRM/data integration use cases; The Integrator pages reference support for distribution-relevant ERPs and connectors (including Epicor Eclipse/P21, Infor, SAP, NetSuite, Sage, and others); Site content and testimonials emphasize dashboard visibility, workflow monitoring, scheduling, and flexibility to integrate with custom APIs.

Distributor evaluation should focus on the specific operational pain points the organization is trying to improve (such as disconnected systems causing manual data re-entry, delays, and inconsistent customer experience; ERP/eCommerce/CRM integration complexity that overwhelms small internal IT teams; data mapping and analytics bottlenecks that limit adoption of better tools), whether the available capabilities match the required workflow scope (including DCKAP Integrator for ERP-first application integration and orchestration across distribution systems; System-to-system integrations spanning ERP, eCommerce, CRM, WMS, analytics, and related tools; Platform-agnostic connectivity using APIs, SFTP/FTP, EDI, and custom integration patterns), stakeholder ownership and process fit (for example, Primary buyers: IT, digital/eCommerce, operations, data/analytics leaders; sometimes sales ops/marketing ops; Best fit for distributors needing durable middleware/integration orchestration without large custom-development teams), along with integration requirements, implementation approach, and the level of change management needed for adoption.

### Solutions / Capabilities for Distributors

- DCKAP Integrator for ERP-first application integration and orchestration across distribution systems
- System-to-system integrations spanning ERP, eCommerce, CRM, WMS, analytics, and related tools
- Platform-agnostic connectivity using APIs, SFTP/FTP, EDI, and custom integration patterns
- Customer-visible workflow/log monitoring, scheduling, and management capabilities
- DCKAP EDI platform for trading-partner onboarding, document automation, monitoring, and exception handling

### Distributor Problems They Address

- Disconnected systems causing manual data re-entry, delays, and inconsistent customer experience
- ERP/eCommerce/CRM integration complexity that overwhelms small internal IT teams
- Data mapping and analytics bottlenecks that limit adoption of better tools
- Tool lock-in or convenience-driven platform choices that constrain long-term flexibility
- Manual or brittle EDI workflows that create errors, penalties, and support burden

## Where They Fit / Best Use Cases

- Primary buyers: IT, digital/eCommerce, operations, data/analytics leaders; sometimes sales ops/marketing ops
- Best fit for distributors needing durable middleware/integration orchestration without large custom-development teams
- Strong use cases include ERP-to-eCommerce, ERP-to-CRM, channel data flow, and EDI modernization

## Dill Technologies — Automated Credit, AR, and Online Payments for Electrical Distributors

Website: <https://usedill.com/>

### Executive Summary

Dill is the leading trade credit, online payments, and accounts receivable platform for electrical distributors. Dill provides modules that integrate credit, collections, and accounts receivable teams across the country.

Dill is an official solution partner of numerous buying groups and associations in the construction materials industry, including NAED, Affiliated Distributors (AD), Blue Hawk, IMARK Plumbing, Commonwealth (TCG), American Supply Association (ASA), and NetPlus Alliance. Dill is also an official integration vendor of the National Association of Credit Management (NACM).

### Solutions / Capabilities for Distributors

- Online Payments/Accounts Receivable Automation: Dill provides an online payment portal integrated with your ERP where your customers can retrieve invoices and statements and pay by bank ACH or card, helping accelerate cash flow and providing a better customer experience. Dill also automates cash application back into your ERP, as well as past due reminders and statements.
- Trade Credit Automation: Dill automates the credit application process, helping distributor teams accelerate customer account onboarding, reduce fraud, and make more informed credit decisions. Features include customizable online forms, instant bank references, automated trade reference outreach, credit monitoring, as well as integration with all major credit bureaus like NACM, CreditSafe, Experian, and more.

### Distributor Problems They Address

- Credit application submissions are handwritten or missing key information and signatures, leading to back and forth with your customers.
- Your team has received fraudulent application submissions, wasting your team time and negatively impacting the bottom line.
- There is a lot of admin time in reviewing credit applications, like reaching out and following up to trade references, bank references, and pulling credit reports from different sites.
- Your team has had a major loss or write-offs before.
- You're constantly fielding phone calls from sales asking for updates on application status. They're "flying blind" when it comes to driving applications to completion.
- Your customers are asking for an online payment portal, as they want the convenience.
- Competitors are rolling out online payment portals, and you want to stay competitive.
- Credit card fees eat into your margins.
- Your team has run into credit card fraud for COD customers.
- Checks get lost, washed, or take weeks to arrive, delaying cash flow.
- ACH has been difficult to set up for your customer and difficult to reconcile for your team.
- There is a lot of admin time in fielding questions about invoice copies, applying payments in your ERP, making collection calls, etc.

### Where They Fit / Best Use Cases

- Primary buyers: credit managers, directors of credit, CFOs, credit analysts, accounts receivable managers, controllers, office managers, owners and presidents
- Best fit for credit and finance teams and ownership that are looking to improve their process, scale their revenue, and accelerate cash flow.

## Enable — Rebate & Commercial Agreement Management

Website: <https://enable.com/>

### Executive Summary

Enable is a pricing and rebate management platform focused on helping businesses manage complex commercial agreements, improve margin control, and automate pricing/rebate workflows. In product discussions, the strongest distributor use case appeared to be rebate-centric: supplier rebates, customer rebates, SPAs, target tracking, renewal management, compliance, and visibility into opportunities and risks that are often buried in spreadsheets or siloed files.

For distributors, Enable can help where rebate and pricing complexity is materially affecting profitability, finance workload, or supplier-program execution. Product discussions also point to an important practical value test: not just seeing rebate targets and opportunities, but identifying who in the business needs to act (by branch/vendor/program) to capture them. That operational accountability layer is exactly where platforms like this become strategic instead of just reporting tools.

Product discussions covered rebate optimization for distributors. Evaluation conversations also emphasized adoption and change-management considerations, workflow-specific demos or pilot validation, integration scope and system-of-record alignment.

Public website materials highlight how the company positions itself around AI-powered pricing and rebate intelligence, with products spanning rebate management, pricing management, analytics/AI, collaboration, and integrations; The distribution industry pages speak directly to margin

protection, supplier-program complexity, rebate/pricing workflow automation, and stronger supplier relationships; Enable emphasizes connected commercial data across ERP/CRM/CPQ/POS/financial systems to create a single source of truth for pricing, rebates, and agreements.

Distributor evaluation should focus on the specific operational pain points the organization is trying to improve (such as spreadsheet-driven rebate processes causing leakage, missed earnings, and slow reconciliation; limited visibility into rebate opportunities and risks, and weak accountability for hitting targets; manual pricing and rebate workflows creating errors, delays, and audit/compliance risk), whether the available capabilities match the required workflow scope (including Rebate management platform for agreement storage, calculations, tracking, and performance analysis; Pricing management capabilities to govern pricing logic, execution, and margin visibility; AI-powered analytics and commercial intelligence across pricing/rebate programs), stakeholder ownership and process fit (for example, Primary buyers: Finance, procurement, pricing/commercial leadership, sales operations, IT; Best fit for distributors with meaningful supplier-program complexity (rebates, SPAs, chargebacks/deviations) and margin-management pressure), along with integration requirements, implementation approach, and the level of change management needed for adoption.

#### **Solutions / Capabilities for Distributors**

- Rebate management platform for agreement storage, calculations, tracking, and performance analysis
- Pricing management capabilities to govern pricing logic, execution, and margin visibility
- AI-powered analytics and commercial intelligence across pricing/rebate programs
- Approval workflows and collaboration features for internal teams and partner-facing processes
- Integrations across ERP/CRM/CPQ/POS/financial systems to create a unified commercial data foundation

#### **Distributor Problems They Address**

- Spreadsheet-driven rebate processes causing leakage, missed earnings, and slow reconciliation
- Limited visibility into rebate opportunities/risks and weak accountability for hitting targets
- Manual pricing and rebate workflows creating errors, delays, and audit/compliance risk
- Fragmented pricing, rebate, and agreement data across teams and systems
- Difficulty coordinating procurement, finance, and sales around the same supplier-program facts

#### **Where They Fit / Best Use Cases**

- Primary buyers: Finance, procurement, pricing/commercial leadership, sales operations, IT
- Best fit for distributors with meaningful supplier-program complexity (rebates, SPAs, chargebacks/deviations) and margin-management pressure
- Useful when the goal is to move from manual tracking to governed, cross-functional execution and decision support

## **Enlighten.Net — Document Management & Automation**

Website: <https://enable.com/>

#### **Executive Summary**

Enlighten.Net is a U.S.-based provider of document management and document automation solutions purpose-built for industrial distributors and manufacturers. Their core offering, ENet Docs, centralizes, secures, and enables instant retrieval of business-critical documents. Strategic partnerships and integrations with Esker Automation extend capabilities across Accounts Payable, Sales Order Processing, and Order-to-Cash workflows. Enlighten.Net is known for tight ERP integrations (notably Epicor Prophet 21, Eclipse, Kinetic, and Prelude), as well as hands-on implementation and support tailored specifically to distribution environments.

#### **Solutions / Capabilities for Distributors**

- Document Management (ENet Docs) - Centralized digital repository for scanned and electronic documents with full-text search, role-based security, and remote access—designed to support high-volume distribution environments.
- Accounts Payable Automation - Invoice capture, validation, approvals, and workflow automation are integrated with distributor ERPs to reduce cycle times, errors, and late payments.
- Accounts Receivable / Order-to- Cash Automation - Tools to accelerate invoicing, remittance processing, and cash application - improving visibility and reducing DSO.
- Sales Order & Customer Order Automation - AI driven capture and routing of customer orders from email, EDI, and other formats - enabling faster order entry with fewer manual touchpoints.
- Distribution ERP Integrations: Native or tightly aligned integrations with Epicor Prophet 21, Epicor Eclipse, Kinetic, and Prelude - ensuring automation aligns with distributor workflows rather than generic enterprise processes.

#### **Distributor Problems They Address**

- Paper heavy, manual back office processes that slow order processing, invoicing, and issue resolution.
- Slow document retrieval impacting customer service, audit response times, and internal productivity.
- High labor costs and error rates in AP and Sales Order entry due to manual keying and disconnected systems.
- Limited visibility into transaction related documents across departments such as Customer Service, Accounting, and Operations.

- Process inefficiencies in cash collection and revenue recognition in AR departments.
- ERP limitations in managing unstructured documents and workflows without third party automation.

#### Where They Fit / Best Use Cases

- Small to mid sized industrial distributors seeking to digitize and automate back office processes without replacing their ERP.
- Epicor P21, Eclipse, Kinetic, or Prelude users needing document management and automation that aligns directly with distributor workflows.
- Distributors experiencing growth driven volume increases that expose the limits of manual AP, Sales Order entry, and document handling.
- Organizations seeking fast, measurable outcomes by leveraging proven implementations and distributor-focused support instead of heavily customized enterprise platforms.
- Distributors who want audit, service, and process visibility for Finance and Operations.

## GAINS — Supply Chain Planning, Inventory Optimization & Decision Engineering

Website: <https://gainsystems.com>

#### Executive Summary

GAINS is a supply chain design and planning platform purpose-built for environments with high SKU complexity, multi-location distribution networks, and volatile demand and supply conditions. Distribution is one of the company's core verticals, and many of its longest-standing customer relationships are with electrical, industrial, wholesale, and specialty distributors. GAINS positions its platform around what it calls Decision Engineering & Orchestration (DEO): combining AI/ML, advanced optimization algorithms, and composable architecture to help planners and buyers make faster, more confident inventory, replenishment, and network design decisions.

For distributors, the practical value centers on replacing spreadsheet-driven planning and static min/max approaches with a system that continuously recalibrates forecasts, safety stock, replenishment parameters, and ordering recommendations at the individual SKU-location level — across tens or hundreds of thousands of items and multiple branches. GAINS emphasizes that it can layer onto a distributor's existing ERP (SAP, Oracle, or homegrown) without a rip-and-replace, delivering measurable working-capital and service-level improvements in weeks rather than years through a phased implementation methodology it calls P3 (Proven Path to Performance). The company is SOC 2 Type II certified, SAP S/4HANA certified, Oracle certified, and cloud-hosted.

Distributor evaluation should recognize the tradeoff: GAINS delivers the most value to organizations with enough SKU and location complexity to outgrow spreadsheet-based or basic ERP planning. Companies with simpler catalogs, fewer locations, or early-stage planning maturity may find the investment ahead of where they are today, though GAINS' composable architecture is designed to allow distributors to start with a targeted capability (such as inventory optimization or lead time prediction) and expand over time.

#### Solutions / Capabilities for Distributors

- Demand planning and forecasting that automatically selects the best-fit algorithm for each SKU-location, handling fast movers, slow movers, intermittent demand, seasonality, and new product introductions through like-item matching
- Inventory optimization and policy planning that calculates safety stock, reorder points, and stocking levels individually by SKU-location, balancing service-level targets against working capital constraints across a multi-echelon network
- Automated and optimized replenishment including cross-SKU order builders that intelligently meet vendor minimums and free-freight thresholds without over-ordering, with the ability to automate routine purchase decisions for high-velocity items while flagging exceptions for planner review
- Lead Time Prediction using machine learning to replace static lead time assumptions with probabilistic, supplier-specific lead time forecasts that feed directly into safety stock and replenishment calculations
- Demand Prediction (emerging AI capability) for ML-driven demand sensing that augments traditional statistical forecasting
- Supply Decision Automation (emerging AI capability) that learns from top-performing buyers' behaviors to trigger smart, automated buying decisions including quantity adjustments and supplier prioritization
- Supply chain network design using discrete-event simulation and optimization to evaluate distribution network configurations, inventory positioning, sourcing strategies, and what-if scenarios (e.g., adding/closing branches, responding to disruption)
- Sales and operations planning (S&OP) providing a connected view from strategic planning through execution
- ERP-agnostic integration with certified SAP and Oracle connectors and a Connect API, designed to work alongside one or multiple ERP environments without requiring system replacement

#### Distributor Problems They Address

- Outgrowing spreadsheets and static rules: Planners applying broad-brush business rules (e.g., a single moving average or blanket days-of-supply targets across all products) because Excel or basic ERP tools can't handle granular, SKU-location-level planning at scale
- Simultaneous overstock and stockout: Inventory tied up in the wrong items or wrong locations while high-demand SKUs stock out, driven by lack of differentiated planning between fast-moving A items and slow-moving/intermittent C and D items
- Excess working capital trapped in inventory: Difficulty right-sizing inventory investment across a large catalog without sacrificing fill rates, leading to cash flow pressure and rising carrying costs

- Supplier lead time variability: Static lead time assumptions that don't reflect actual supplier performance, causing safety stock to be either too high (excess inventory) or too low (stockouts and expedited freight)
- Manual, time-consuming buying workflows: Buyers spending hours manually building purchase orders, calculating vendor minimums, and evaluating freight thresholds instead of focusing on high-value exceptions and strategic decisions
- Lack of network-wide visibility: Siloed planning by branch or location that misses opportunities to balance inventory across the network, resulting in costly inter-branch transfers and expedited shipping
- Difficulty scaling planning during growth: Organizations adding branches, SKUs, or supplier relationships through acquisition or organic growth that overwhelm existing planning processes and headcount
- Inability to model and respond to disruption: No capability to simulate the impact of supply chain disruptions, tariff changes, or demand shifts before they hit — leading to reactive rather than proactive decision-making

#### Where They Fit / Best Use Cases

- Best fit for distributors with \$150M+ revenue (ideal \$300M+), 10,000–500,000+ SKUs, multi-location networks, high supplier variability, and service-level pressure — particularly in electrical, industrial, metals, wholesale, automotive parts, HVAC/plumbing, and medical device/equipment distribution
- Strongest when the organization has outgrown spreadsheet-based or basic ERP planning, has enough SKU-location complexity to benefit from automated, algorithm-driven decisions, and is ready to invest in a platform approach rather than incremental spreadsheet improvements
- Especially useful where the distributor competes on availability and fill rate, needs to free up working capital without sacrificing service, or faces volatile lead times and demand patterns that static planning parameters can't handle
- Composable entry points: Distributors can start with a targeted capability — such as inventory optimization, replenishment automation, or lead time prediction — and expand to additional modules over time without a large upfront commitment to the full platform
- Less suitable for very small distributors with simple catalogs and few locations where spreadsheet-based planning still meets the need, or for organizations not yet ready to commit to a planning system with ongoing data integration and user adoption requirements

## Infor — Distribution ERP & WMS Platform

Website: <https://www.infor.com/>

#### Executive Summary

Infor is a broad enterprise platform provider, but product discussions consistently point to the strongest distribution fit being specific operational entry points—especially WMS, warehouse/process modernization, and implementation discipline tied to measurable outcomes. That is the right framing. Leading with a giant ERP story is too broad for most members; leading with warehouse results and real use cases is far more defensible.

The relationship appears to be moving in a useful direction: education-first collaboration, case-study storytelling, and functional conversations (warehouse, services, workforce, AI applications) instead of generic promotion. Jeff and team seem willing to engage that way, which makes Infor a stronger allied partner candidate for practical distribution programming.

Product discussions covered WMS, implementation outcomes, and how Infor can support distributors through practical education vs. traditional booth marketing; webinars, workshops, and distributor readiness topics. Evaluation conversations also emphasized adoption and change-management considerations, integration scope and system-of-record alignment, electrical-distribution use cases.

Public website materials highlight Infor emphasizes industry-specific cloud software and distribution as a core vertical; Distribution ERP pages highlight AI, inventory/warehouse management, multi-channel orders, and value-added services; WMS and services pages reinforce cloud WMS capabilities plus professional services and organizational change management support.

Distributor evaluation should focus on the specific operational pain points the organization is trying to improve (such as warehouse inefficiency and inventory/order visibility gaps; ERP/WMS projects that underperform because success metrics and readiness are weak; disconnected multi-site processes across ops, customer service, and supply chain), whether the available capabilities match the required workflow scope (including Distribution ERP / CloudSuite capabilities across inventory, purchasing, financials, and multi-channel order management; Cloud WMS for receiving, put-away, picking, replenishment, labor management, and value-added services; AI-enabled distribution workflows, analytics, alerts, and role-based user experiences), stakeholder ownership and process fit (for example, Primary buyers: Ops/warehouse leaders, supply chain, IT/ERP, finance, HR/workforce leaders; Best fit for distributors pursuing meaningful operational modernization (ERP/WMS/process redesign), not just a narrow point solution), along with integration requirements, implementation approach, and the level of change management needed for adoption.

#### Solutions / Capabilities for Distributors

- Distribution ERP / CloudSuite capabilities across inventory, purchasing, financials, and multi-channel order management
- Cloud WMS for receiving, put-away, picking, replenishment, labor management, and value-added services
- AI-enabled distribution workflows, analytics, alerts, and role-based user experiences
- Workforce management plus implementation/professional services, training, and change-management support

### Distributor Problems They Address

- Warehouse inefficiency and inventory/order visibility gaps
- ERP/WMS projects that underperform because success metrics and readiness are weak
- Disconnected multi-site processes across ops, customer service, and supply chain
- Difficulty proving ROI and building confidence for larger transformation investments

### Where They Fit / Best Use Cases

- Primary buyers: Ops/warehouse leaders, supply chain, IT/ERP, finance, HR/workforce leaders
- Best fit for distributors pursuing meaningful operational modernization (ERP/WMS/process redesign), not just a narrow point solution
- Strong distribution use cases: WMS implementation stories, modern warehouse content, and change-management/ROI conversations

## Interlynx Systems — Lead/Quote/POS Workflow Reporting & Analytics

Website: <https://www.interlynxsystems.com/>

### Executive Summary

Interlynx Systems helps distributors work more effectively with their suppliers so they can win more business with both existing customers and prospective customers.

Distributors deal with constant complexity—sales leads, pricing programs, quotes, rebates, and sales data—coming from multiple suppliers in different formats. That complexity slows execution and creates missed opportunities.

Interlynx simplifies and structures that interaction, enabling distributors to respond faster, stay aligned with suppliers, and execute more effectively with customers. Result: better execution, stronger supplier relationships, and more business won. Bottom Line

Turn supplier inputs → into consistent execution → into more closed business

### Solutions / Capabilities for Distributors

- Rebate / SPA Management: Ensures distributors capture everything they're eligible for and submit accurate, timely claims
- Quote Management: Provides visibility and drives consistent follow-up to close more business
- POS & Customer Insights: Identifies threats and opportunities within customer and sales data
- Sales Lead Management: Ensures all opportunities are followed up and reported back to suppliers

### Distributor Problems They Address

- Missed Revenue: Rebates unclaimed, quotes not followed up, sales leads underworked
- Supplier Misalignment: Lack of visibility and feedback back to suppliers
- Hidden Risk & Opportunity: No clear view into customer gains, losses, and gaps
- Execution Gaps: Inconsistent follow-through across teams

### Where They Fit / Best Use Cases

- Capture more revenue already in their system
- Execute better on supplier programs
- Gain visibility into customer activity
- Improve follow-through and accountability
- Strengthen supplier relationships

## Leverage.AI — PO Follow-up & Inbound Visibility Automation

Website: <https://tryleverage.ai/>

### Executive Summary

Leverage.AI is a strong operations tool for automating PO supplier follow-up work and turning messy supplier communications into usable ERP data. The practical value is not only buyer time savings—it also includes cleaner visibility, faster exception handling, better supplier accountability, and more reliable planning inputs.

They are the leading platform out there for automating inbound supplier follow-up (acknowledgments, open orders, shipment updates) and feeding results back to your ERP. They have pre-built plugins into over 35 ERPs leading to minimal IT work on either end.

Hundreds of distributors use Leverage today to allow buyers to focus on more strategic work, increase lead times, and allow their entire company to gain real-time access to the latest PO and shipment updates.

The best part is that suppliers don't need to change their behavior. Using AI, Leverage reads existing supplier responses, PDFs and spreadsheets right from email inboxes, leading to 100% supplier onboarding.

### Solutions / Capabilities for Distributors

- PO follow-up automation for acknowledgments, open-order updates, and supplier communications
- Shipment tracking / inbound visibility with exception alerts and line-item status updates
- Email/PDF/Excel parsing and ERP integration to keep system-of-record data current
- Supplier performance dashboards, scorecards, and analytics/API data exports

### Distributor Problems They Address

- Buyers spending too much time chasing status updates manually
- Poor inbound PO visibility creating planning and customer-service issues
- Late supplier signals with weak exception management
- Limited supplier performance insight beyond spend/volume

### Where They Fit / Best Use Cases

- Primary buyers: Purchasing/procurement, supply chain, inventory planning, ops, IT/integration support, finance
- Best fit where inbound PO volume and supplier follow-up burden are high, PO visibility is low, or generally if humans are manually chasing down suppliers today.

## Move78 Solutions — AI Adoption & Transformation Readiness Consulting

Website: <https://www.move78solutions.com/>

### Executive Summary

Move78 Solutions helps distributors close the workforce readiness gap that stalls Digital and AI transformation. Their core approach starts with measurement - using proprietary assessment tools including the 7 Levels of AI Competency and a Digital Competency Measurement (DCM) framework to give leadership a clear, data-driven picture of where their people actually stand across both digital fundamentals and AI readiness. From there, they deliver customized training - from foundational digital literacy for teams still getting comfortable with everyday tools, through to advanced AI fluency for employees ready to lead. For organizations with people already using AI without guardrails, they build governance frameworks to manage risk. Their flagship program, Raise the Floor, is built on three pillars: Measure, Raise, and Govern. The thesis is straightforward - most distributors are investing in technology while underinvesting in the people who need to use it. Many workforces have gaps at the digital fundamentals level that need to be addressed before AI adoption can take hold. Move78 addresses both with programs tailored specifically to B2B distribution and service environments.

### Solutions / Capabilities for Distributors

- Workforce readiness assessment using proprietary frameworks - the 7 Levels of AI Competency and Digital Competency Measurement (DCM) - delivering individual scores and organizational heatmaps across both digital and AI skills
- Adaptive digital reskilling programs covering foundational digital literacy, productivity tools, data skills, collaboration, cybersecurity awareness, and AI fluency - delivered live or via LMS with content customized by role and skill level
- AI governance and usage policy development for organizations with advanced users operating without guardrails
- System integration consulting - connecting operational tools to reduce manual steps and errors
- Change management and adoption support tailored to distributor and service/manufacturing environments

### Distributor Problems They Address

- No clear picture of where the workforce stands on digital literacy and AI readiness

- Employees struggling with everyday digital tools (cloud storage, collaboration platforms, data entry) before AI is even on the table
- AI and digital tools being adopted unevenly - some people way ahead, others left behind
- Advanced AI users operating without governance or usage policies (the "brilliant cowboy" risk)
- Training programs that are too generic and don't stick because they aren't matched to actual skill level
- Transformation initiatives stalling because people readiness was overlooked

#### Where They Fit / Best Use Cases

- Primary buyers: Executives, HR/L&D leaders, ops leaders, and transformation teams
- Best fit when an organization knows it needs to upskill its workforce for digital tools and AI but doesn't know where to start or how to measure progress
- Strong use cases: workforce readiness assessment, adaptive digital and AI reskilling program design, AI governance frameworks, and role-level competency mapping

## Parspec.io — Electrical Spec/Quote/Submittal Automation

Website: <https://www.parspec.io/>

#### Executive Summary

Parspec is frequently cited in product discussions as a strong electrical-channel-specific solution. The solution is squarely aimed at the product-selection/quoting/submittal workflows where project teams lose time, consistency, and margin — especially in lighting and electrical applications.

Their website reinforces the same story with an AI-powered workflow platform across Product Finder, Quoting, and Submittals + O&Ms. This is not generic AI positioning; it is targeted workflow acceleration for project-based teams that need faster bids, better package quality, and fewer manual documentation steps.

Product discussions covered product review, deeper architecture discussion, and possible alignment with distribution's "broader visibility initiatives" and broader AI initiatives. Evaluation conversations also emphasized electrical-distribution use cases.

Public website materials highlight Parspec's site clearly shows three connected products (Product Finder, Quoting, Submittals + O&Ms) and emphasizes AI-assisted extraction, alternative recommendations, and package automation tied to better speed, win rates, and profitability.

Distributor evaluation should focus on the specific operational pain points the organization is trying to improve (such as too much manual time in product selection/crossing during quoting; slow quote turnaround and inconsistent quote package quality; manual submittal/O&M creation and repetitive markup/document work), whether the available capabilities match the required workflow scope (including AI-powered Product Finder for spec-compliant alternatives and BOM/product selection; Quoting workflows with data extraction, pricing/collaboration support, and polished quote packages; Submittals + O&M automation (document matching, annotation, branded package creation, sharing)), stakeholder ownership and process fit (for example, Best fit for distributors, reps, and project quotation teams with significant project-bid volume (especially lighting/electrical), including quotation coordinators, project sales, product specialists, and operations leaders), along with integration requirements, implementation approach, and the level of change management needed for adoption.

#### Solutions / Capabilities for Distributors

- AI-powered Product Finder for spec-compliant alternatives and BOM/product selection.
- Quoting workflows with data extraction, pricing/collaboration support, and polished quote packages.
- Submittals + O&M automation (document matching, annotation, branded package creation, sharing).
- Document/image extraction + attribute parsing; ERP file exchange/export support.

#### Distributor Problems They Address

- Too much manual time in product selection/crossing during quoting.
- Slow quote turnaround and inconsistent quote package quality.
- Manual submittal/O&M creation and repetitive markup/document work.
- Difficulty balancing spec compliance, lead time, and margin in substitutions.

**Where They Fit / Best Use Cases** - Best fit for distributors, reps, and project quotation teams with significant project-bid volume (especially lighting/electrical), including quotation coordinators, project sales, product specialists, and operations leaders.

# Pivotree — B2B Commerce Agency & Implementation Services

Website: <https://www.pivotree.com/>

## Executive Summary

Pivotree is a frictionless commerce partner for manufacturers and distributors, combining digital commerce implementation with deep data and catalog services. They operate across three core areas of expertise: AI Catalog Management, ERP System Integrations, and Commerce Platform Implementations. This combination allows them to work in the layer where messy product data, taxonomy, and channel execution either enable or block growth — not just at the storefront level.

The primary fit is manufacturers and distributors seeking to modernize customer experience while recognizing that website improvements alone do not address broader operational challenges. Pivotree's approach stresses that internal productivity (search, taxonomy, onboarding speed, content quality, process design) is the foundation, and that AI value compounds as the data improves. Their positioning is also evolving toward broader AI readiness and agentic commerce preparation, which matches what members are saying: they need a roadmap, not another point solution.

Areas of Expertise: AI Catalog Management PIM/MDM implementation, product data enrichment, taxonomy design, data governance, and orchestration — unified under an AI-ready catalog strategy. For distributors, this means making product content usable and consistent across digital channels. For manufacturers, it means creating a clean, structured golden record that supports downstream channel partners, marketplaces, and direct-to-customer experiences. This work prepares both for search, recommendations, personalization, and machine-driven buying.

System Integrations Connecting commerce platforms, ERP, PIM, and other core systems into a coherent operational architecture. Distributors benefit from unified data flow across fragmented ordering, inventory, and content systems. Manufacturers gain tighter connectivity between product data sources, channel partners, and go-to-market platforms. The focus is on process design and ensuring that technology investments work together rather than in silos.

Commerce Platform Implementations Frictionless B2B commerce strategy, implementation, and managed services across composable and B2B commerce stacks (including BigCommerce, Shopify Plus, and VTEX). For distributors, this covers modernizing the buying experience for counter staff, field sales, and self-service customers. For manufacturers, it supports direct-to-customer commerce, dealer/distributor portals, and hybrid go-to-market models. Full lifecycle from platform selection through launch and ongoing optimization.

## Solutions / Capabilities for Distributors

- Frictionless B2B commerce strategy, implementation, and managed services.
- ECommerce platform support (e.g., composable/B2B commerce stacks).
- PIM/MDM implementation and product data enrichment.
- Taxonomy/data governance/orchestration.
- Digital channel readiness work that supports search, recommendations, and AI use cases.

## Distributor Problems They Address

- Outdated commerce experiences that don't meet modern buyer expectations.
- Inconsistent or incomplete product data across channels and trading partners.
- Weak search and taxonomy that undermine self-service adoption.
- Slow onboarding of sales and counter teams onto digital tools.
- Fragmented systems and content processes with no unified data flow.
- Lack of a data foundation for AI, personalization, and agentic commerce.
- Manufacturer difficulty maintaining product data quality across distributor and marketplace channels.
- No clear roadmap for connecting product content strategy to digital commerce execution.

## Where They Fit / Best Use Cases

- Evaluation Considerations: Manufacturers and distributors evaluating Pivotree should focus on the specific operational pain points the organization is trying to improve, whether the available capabilities match the required workflow scope, and how stakeholder ownership maps to the engagement. Key considerations include integration requirements, implementation approach, adoption and change management, and data readiness. Evaluation conversations have also emphasized measurable outcomes and proof points. They offer detailed reporting, audits, and a POC-first approach to evaluating strategic value.
- Best fit for mid-to-large manufacturers and distributors (engagement discussions indicate >\$100M revenue as a practical floor). Ideal stakeholders include digital/commerce leaders, marketing/content teams, IT/data teams, eCommerce owners, and commercial leaders who need business adoption and organizational change — not just technical deployment.

# Prokeep — Frontline Customer Communication & Branch Workflow Platform

Website: <https://www.prokeep.com/>

## Executive Summary

Prokeep has matured in product discussions from a branch texting tool to a broader front-of-house workflow platform — what they now describe as an 'AI-powered order engine.' The core value proposition is not just communication, but orchestration: centralizing inbound customer interactions (text, email, chat, fax, phone/FSM channels), improving responsiveness, and connecting that activity directly to quoting and order fulfillment. AI Order Automation accelerates this by extracting line items from customer messages, generating fast and accurate quotes, and ensuring every order request gets a response — reducing the manual effort that slows counter teams down and causes orders to fall through the cracks.

For distributors, Prokeep appears especially useful where order intake is fragmented, response-time performance is inconsistent, and customer-facing teams are trapped in inbox chaos. The AI angle matters, but product discussions show good discipline here: the strongest positioning is AI as an enhancer of order intake and quote workflows (item extraction, order capture, automation) while keeping people in control. That makes the platform easier to evaluate against real KPIs like SLA adherence, conversion speed, onboarding time, and service continuity.

Product discussions covered AI adoption in distribution, distribution engagement strategy, and how Prokeep should position itself for member conversations (workflow platform first, AI automation second). Notes also tie Prokeep discussions to 'broader visibility initiatives' and the upcoming solution matrix. Evaluation conversations also emphasized adoption and change-management considerations, data readiness and process/data quality requirements, measurable outcomes and proof points.

Public website materials highlight the platform as an AI-Powered Order Engine purpose-built for distribution's front-of-house and claims support for 8,500+ distributors and 20M+ orders.

Distributor evaluation should focus on the specific operational pain points the organization is trying to improve (such as slow response times and lost orders from fragmented communication; inconsistent service levels across branches/teams; institutional knowledge trapped in individual inboxes and phones.), whether the available capabilities match the required workflow scope (including Unified front-of-house communication workspace (text/email/chat/fax/phone-linked workflows); Shared inbox and customer communication centralization; AI-assisted order intake/order automation), stakeholder ownership and process fit (for example, Best fit for distributors with high inside sales/counter order volume and multi-channel inbound communications; Primary stakeholders: branch operations, inside sales, customer service, sales leadership, IT/integration teams, and commercial ops leaders focused on SLA, productivity, and service consistency), along with integration requirements, implementation approach, and the level of change management needed for adoption.

## Solutions / Capabilities for Distributors

- Unified front-of-house communication workspace (text/email/chat/fax/phone-linked workflows).
- shared inbox and customer communication centralization.
- AI-assisted order intake/order automation.
- quote/order processing workflow support.
- branch/marketing outreach tools.
- ERP/CRM integration and data enrichment in the flow of work.

## Distributor Problems They Address

- Slow response times and lost orders from fragmented communication.
- inconsistent service levels across branches/teams.
- institutional knowledge trapped in individual inboxes/phones.
- long counter/inside sales ramp-up time.
- manual order intake from customer messages/photos.
- limited visibility into responsiveness and workflow bottlenecks.

## Where They Fit / Best Use Cases

- Best fit for distributors with high inside sales/counter order volume and multi-channel inbound communications.
- Primary stakeholders: branch operations, inside sales, customer service, sales leadership, IT/integration teams, and commercial ops leaders focused on SLA, productivity, and service consistency.

## PROS.ai — Price Optimization & CPQ

Website: <https://pros.com/>

### Executive Summary

PROS is an enterprise-scale pricing and quoting provider with deep roots in dynamic pricing and a long track record in complex industries. In product discussions, Kaitlynn positioned PROS as a company with a significant data science bench and established AI credibility, with specific relevance to manufacturing, distribution, and services. The distributor-facing value proposition in product discussions centers on pricing optimization and CPQ (configure/price/quote) capabilities that plug into existing sales workflows and help teams produce accurate quotes faster.

The practical fit for distributors is strongest at larger distributors and manufacturers where pricing complexity, quote volume, and margin pressure justify a more sophisticated system. Product discussions suggest PROS is not a lightweight starter tool; it is better viewed as a strategic pricing/quoting platform for organizations that are ready to tighten pricing governance, improve consistency, and modernize how sales teams quote and negotiate across channels.

Product discussions covered potential distribution collaboration, demo follow-up, and thought-leadership support around AI/pricing. Notes indicate prior positive experience with distribution events and relationships with Catherine and Gail. Evaluation conversations also emphasized workflow-specific demos or pilot validation, integration scope and system-of-record alignment, electrical-distribution use cases. Public website materials highlight PROS' distribution industry page emphasizes complex pricing and quoting across eCommerce, direct sales, and distributor networks, including automated real-time price updates, streamlined approval workflows for RFPs/renewals/SPAs, and real-time analytics.

Distributor evaluation should focus on the specific operational pain points the organization is trying to improve (such as margin leakage from inconsistent pricing and overrides; manual pricing updates; slow/complex quoting cycles), whether the available capabilities match the required workflow scope (including Price optimization and dynamic pricing capabilities; CPQ / quoting workflow tools for complex product and pricing scenarios; AI-enabled pricing guidance and analytics), stakeholder ownership and process fit (for example, Best fit for larger distributors/manufacturers with complex pricing and quoting requirements (product discussions indicate a typical focus on larger organizations); Primary stakeholders: pricing leaders, sales leadership, quote desks, commercial excellence teams, IT/CRM owners, and finance leaders focused on margin governance), along with integration requirements, implementation approach, and the level of change management needed for adoption.

### Solutions / Capabilities for Distributors

- Price optimization and dynamic pricing capabilities.
- CPQ / quoting workflow tools for complex product and pricing scenarios.
- AI-enabled pricing guidance and analytics.
- rebate-related capabilities (via broader PROS B2B platform components).
- integration into CRM/sales workflows for quote generation and approval processes.

### Distributor Problems They Address

- Margin leakage from inconsistent pricing and overrides.
- manual pricing updates.
- slow/complex quoting cycles.
- poor pricing governance across channels.
- difficulty balancing competitiveness with profitability.
- weak analytics for pricing and commercial decisions at scale.

### Where They Fit / Best Use Cases

- Best fit for larger distributors/manufacturers with complex pricing and quoting requirements (product discussions indicate typical focus on larger enterprises).
- Primary stakeholders: pricing leaders, sales leadership, quote desks, commercial excellence teams, IT/CRM owners, and finance leaders focused on margin governance.

# Proton.AI — Distribution CRM & AI Sales Enablement

Website: <https://www.proton.ai/>

## Executive Summary

Proton is the industry cloud for distributors. Purpose-built for distribution, Proton's modular, AI-powered platform connects all of a distributor's data on one shared foundation and puts AI to work across the entire operation — not AI that suggests, but AI that does the work.

For decades, distributors have been forced to stitch together point solutions that don't talk to each other — turning their people into the integration layer. The result is wasted time, unreliable data, and teams stuck doing busywork instead of serving customers. Proton solves this by replacing disconnected tools with a connected platform that drafts quotes from inbound emails, enriches product records from vendor PDFs, and builds orders from spreadsheets. People stay in the loop, reviewing and approving, but the manual work that eats up their day is handled.

Products include CRM, PIM, eCommerce AI, and Order & Quote Entry Automation — each purpose-built for distribution, each making the others smarter because they share the same data layer. Integrates with all major distribution ERPs.

Proton works with electrical distributors of all shapes and sizes — from publicly traded companies to PE-backed firms to family-owned businesses. Beyond electrical, Proton also serves distributors across industrial, HVAC, plumbing, jan-san, building materials, and specialty verticals.

## Solutions / Capabilities for Distributors

- CRM: Distribution-focused CRM with AI-guided sales workflows, next-best-action recommendations, and rep productivity support.
- PIM: AI-powered product data enrichment and taxonomy management (PIM).
- eCommerce AI: Personalized eCommerce product recommendations trained on full order history.
- Order & Quote Entry Automation: Order & quote entry automation with AI cross-referencing.
- Inventory AI: AI-driven demand forecasting and inventory optimization to reduce stockouts, minimize excess inventory, and improve fill rates.
- Pricing AI: AI-powered pricing recommendations that help distributors protect and grow margin — using customer, product, and market data to suggest optimal prices at the line-item level.

## Distributor Problems They Address

- Generic CRMs fail in distribution — Proton CRM is purpose-built for distributors with AI recommendations baked in
- Reps don't know what to sell next — AI analyzes purchase history to surface cross-sell/upsell opportunities and recover wallet share leakage
- Slow rep ramp & institutional knowledge loss — AI acts as a virtual mentor for new reps, and customer insights live in the platform instead of a retiring rep's head
- No visibility into at-risk accounts — AI flags declining purchase patterns and lapsed customers before they churn
- Reps waste hours on admin — Pronto, the AI chatbot inside Proton, automates note-taking, follow-ups, account lookups, and reporting
- Stale, IT-dependent reporting — Proton BI gives real-time self-service analytics on rep activity, pipeline, and performance
- Poor product data (only 25-30% of SKUs enriched) — PIM uses AI to enrich the full catalog from multiple sources
- Manual order & quote entry — AI parses incoming emails/PDFs, matches items to catalog, and drafts quotes automatically
- No commerce personalization & lost revenue from stockouts — AI-powered recommendations increase basket size on webstores, and Sourcing auto-finds substitutes from master distributors in seconds

## Where They Fit / Best Use Cases

- Best fit for SMB, mid-market, and enterprise distributors looking to increase margin, build a holistic AI strategy, improve operational efficiency, and make faster decisions — whether replacing disconnected point solutions with a connected platform or starting with one module and expanding.
- Entry points vary by pain: CRM for sales productivity, PIM for product data, eCommerce AI for online revenue, Order & Quote Entry for operational efficiency.
- Primary stakeholders: sales leadership, outside/inside sales teams, eCommerce/digital leaders, merchandising/product data teams, operations, and IT/data teams supporting ERP integration and governance.

## Slimstock Inc — Demand Planning & Inventory Optimization

Website: <https://www.slimstock.com/>

### Executive Summary

Slimstock frequently appears in product discussions as a highly configurable AI/ML planning and inventory optimization partner, anchored by the Slim4 platform. The technical conversations repeatedly center on demand planning, forecasting, replenishment optimization, exception-based management, KPI/reporting visibility, ABC/XYZ style prioritization, and planning workflows that help distributors move from reactive inventory management to a more proactive, disciplined, data-driven decisions. Just as important, product discussions show they understand that tool capability alone is not the win — adoption, training, and role design (e.g., forecasting responsibilities) are what determine realized value.

From a distributor perspective, Slimstock's strongest value appears to be enhanced visibility in helping distributors improve availability, inventory performance and planning maturity without jumping straight to over-engineered automation. They appear well aligned with the education path being developed because product discussions repeatedly tied their capabilities to real member problems (tariffs, space constraints, S&OP discipline, balancing inventory strategically by location, forecasting adoption, procurement behavior) and a crawl-walk-run adoption model. They also seem willing to contribute educational content and customer stories rather than relying only on event-floor selling.

Public website materials highlight Slim4 as an integrated planning platform connecting demand, supply, inventory, and commerce data with unified decision-making, automated workflows, and real-time insights.

Distributor evaluation should focus on future state goals of organization as well as specific operational pain points the organization is trying to improve such as reactive purchasing and inventory management; stockouts/overstock and poor service-level control; weak forecasting discipline), whether the available capabilities match the required workflow scope (including the Slim4 planning platform for demand forecasting, inventory optimization, replenishment, allocation, complex bill of material, and multi-echelon planning; exception-based planning workflows; KPI and supplier performance reporting), stakeholder ownership and process fit (for example, Best fit for distributors focused on purchasing/procurement, supply chain, inventory, branch/DC operations, and S&OP maturity; Stakeholders include operations, finance and purchasing leaders, inventory planners, supply chain directors, and IT/data teams supporting ERP integration), along with integration requirements, implementation approach, and the level of change management needed for adoption.

### Solutions / Capabilities for Distributors

- Slim4 planning platform for demand forecasting, inventory optimization, replenishment, allocation and multi-echelon planning.
- Proactive exception-based management workflows.
- KPI and supplier performance reporting.
- S&OP/S&OE and scenario planning capabilities including what-if analysis.
- Analytics/AI-assisted features (including natural-language/LLM-oriented data interaction noted in product discussions).

### Distributor Problems They Address

- Reliance on Excel, manual demand and forecasting processes
- Reactive purchasing and inventory management.
- Stockouts/overstock and poor service-level control.
- Weak forecasting discipline.
- Too much planner time spent firefighting.
- Limited visibility into supplier performance and inventory decisions.
- Low adoption of advanced planning tools.
- Planning disconnected from sales collaboration and business incentives.

### Where They Fit / Best Use Cases

- Best fit for distributors focused on purchasing/procurement, supply chain, inventory, branch/DC operations, and S&OP maturity.
- Stakeholders include purchasing leaders, inventory planners, supply chain directors, operations leadership, finance (working capital), and IT/data teams supporting ERP integration.
- Distributors that are looking for a low risk ROI guaranteed AI/ML solution

# SparxIQ — Pricing, Rebates & Profit Analytics for Distribution

Website: <https://sparxiq.com/>

## Executive Summary

SPARXIQ's positioning in product discussions is tightly focused on profit improvement for distributors through pricing, rebates, analytics, and sales performance enablement. The conversation was not generic software talk — it centered on specific commercial and profitability levers that matter in distribution: pricing strategy/optimization, rebate leakage, wallet share, attrition, prospecting, gross margin, operating profit, and true cost-to-serve. That is a strong signal that their value proposition can map directly to executive concerns, not just departmental tooling. This may be a good fit for distributors that know they have margin leakage but cannot yet quantify where it is happening (pricing discipline, vendor rebates, account/product mix, cost-to-serve, or market positioning). SPARXIQ also appears differentiated by combining analytics/tools with training and educational support, which makes them more useful in environments where process change and sales behavior are just as important as the math.

Public website materials highlight the company around 'intelligent sales & profit acceleration' for distributors and manufacturers, with offerings that include PriceGPS (strategic pricing), RebateGPS (SPA & rebate management), and MarketGPS (benchmarking pricing, rebates, costing, and margins).

Distributor evaluation should focus on the specific operational pain points the organization is trying to improve (such as margin leakage from inconsistent pricing; underclaimed or poorly managed vendor rebates/SPAs; low visibility into true profitability and cost-to-serve), whether the available capabilities match the required workflow scope (including Strategic pricing and price optimization tools (PriceGPS); SPA/rebate management and rebate analytics (RebateGPS); Market benchmarking/insights for distributors (MarketGPS)), stakeholder ownership and process fit (for example, Best fit for distributors focused on pricing maturity, rebate capture, commercial analytics, and profit improvement; Primary stakeholders: pricing leaders, sales leadership, finance/profitability teams, rebate/contract administrators, and executive sponsors seeking measurable margin gains), along with integration requirements, implementation approach, and the level of change management needed for adoption.

SPARXIQ runs Trade Hounds, America's largest social marketplace for the skilled trades and is now new launching tools to help distributors leverage social commerce and AI without the heavy lifting. Trade Hounds is a free app where about a half million contractors and tradespeople learn about products and supply houses near them. SPARXIQ can now offer an additional avenue for distributors to increase revenue among the next generation of buyers. The app is designed to make it easier for manufacturers to sell through distributors and works by enhancing distributor-manufacturer partnerships.

## Solutions / Capabilities for Distributors

- Strategic pricing and price optimization tools (PriceGPS).
- SPA/rebate management and rebate analytics (RebateGPS).
- Market benchmarking/insights for distributors (MarketGPS).
- Pricing/profitability analytics and business analysis.
- Sales optimization and training offerings for distributor teams.

## Distributor Problems They Address

- Margin leakage from inconsistent pricing.
- Underclaimed or poorly managed vendor rebates/SPAs.
- Low visibility into true profitability and cost-to-serve.
- Weak market-share/benchmark visibility.
- Sales teams lacking pricing discipline or negotiation support.
- Difficulty tying analytics to commercial action.

## Where They Fit / Best Use Cases

- Best fit for distributors focused on pricing maturity, rebate capture, commercial analytics, and profit improvement.
- Primary stakeholders: pricing leaders, sales leadership, finance/profitability teams, rebate/contract administrators, and executive sponsors seeking measurable margin gains.

## Tecsys — Distribution ERP & WMS Platform

Website: <https://www.tecsys.com/>

### Executive Summary

Tecsys consistently comes up as a warehouse and supply chain operations partner with strong implementation discipline—not just a feature-driven WMS vendor. Discussions tend to center on modernization of warehouse systems, improved data visibility, measurable ROI, and the ability to manage change effectively.

The strongest fit is for distributors with operational complexity and a willingness to improve processes. Within the electrical distribution channel, Tecsys has demonstrated relevance across warehouse management, analytics, and overall fulfillment performance.

Evaluation discussions typically focus on integration scope, alignment with existing systems of record, and the ability to support electrical distribution use cases. These are practical considerations tied to execution, not just functionality.

Public materials reinforce this positioning, with a clear emphasis on warehouse management and industrial distribution. Messaging consistently highlights visibility, warehouse agility, transportation coordination, and data-driven decision-making.

For distributors evaluating Tecsys, the priority should be alignment with specific operational challenges—particularly legacy warehouse systems, manual processes, limited visibility, and integration gaps between core systems.

### Solutions / Capabilities for Distributors

- Elite WMS for inventory visibility, picking/replenishment/shipping, cycle counting, automation, and analytics. In addition to warehouse agility through low-code customization.
- Industrial distribution solutions (warehouse efficiency, productivity, data-driven decisions).
- Structured implementation/readiness approach, including assessments and go-live preparation.

### Distributor Problems They Address

- Legacy warehouse systems and manual processes limiting speed/accuracy.
- Weak inventory and operational visibility for decision-making.
- Integration and readiness challenges in ERP/WMS modernization.
- Productivity

### Where They Fit / Best Use Cases

- Overall, Tecsys is best positioned for distributors looking to modernize warehouse operations in a structured, measurable way—not those seeking incremental or low-impact change.

## TradeCentric — Procure-to-Order Integration & eProcurement Connectivity

Website: <https://www.tradecentric.com/>

### Executive Summary

TradeCentric is positioned as a B2B integration layer between supplier eCommerce storefronts and buyer eProcurement/ERP systems.

Explanations provided during product discussions align closely with information presented on the company's website: automate transaction flow, reduce manual entry, and improve order accuracy at scale.

For distributors, the value is strongest when customers expect procurement-system connectivity (PunchOut and related transaction automation). This is a business enablement/integration play more than a storefront redesign, and the conversation showed they understand the change-management side of adoption.

Product discussions covered platform fit for distributors, educational collaboration ideas, and how TradeCentric supports connected commerce/order-to-cash automation. Evaluation conversations also emphasized integration scope and system-of-record alignment, security and enterprise-readiness requirements.

Public website materials highlight a broad integration stack, 220+ integrations, and explicit security/compliance messaging (ISO 27001, SOC 2 Type 2, PCI, Peppol), which is important for enterprise buyer requirements.

Distributor evaluation should focus on the specific operational pain points the organization is trying to improve (such as manual rekeying and order-entry errors; slow order processing and po exceptions; buyer-specific integration complexity that strains IT teams), whether the available capabilities match the required workflow scope (including PunchOut catalog integration for procurement-driven buying; PO Automation, Invoice Automation, PO Acknowledgement, ASN, and eQuote workflows; ECommerce/ERP/eProcurement integration plus data transformation/validation), stakeholder ownership and process fit (for example, Best fit for distributors/manufacturers serving procurement-

heavy enterprise accounts; stakeholders include eCommerce, IT/integration, customer service, finance, and supply-chain teams), along with integration requirements, implementation approach, and the level of change management needed for adoption.

#### **Solutions / Capabilities for Distributors**

- PunchOut catalog integration for procurement-driven buying.
- PO Automation, Invoice Automation, PO Acknowledgement, ASN, and eQuote workflows.
- eCommerce/ERP/eProcurement integration plus data transformation/validation.
- Analytics/BI and packaged adoption options (Basics through Complete).

#### **Distributor Problems They Address**

- Manual rekeying and order-entry errors.
- Slow order processing and PO exceptions.
- Buyer-specific integration complexity that strains IT teams.
- Poor transaction visibility and reconciliation friction.

**Where They Fit / Best Use Cases** - Best fit for distributors/manufacturers serving procurement-heavy enterprise accounts; stakeholders include eCommerce, IT/integration, customer service, finance, and supply-chain teams.

## **Triggerpoint Media — Branch Digital Signage & Retail Media Programs**

Website: <https://triggerpointmedia.com/>

#### **Executive Summary**

TriggerPoint Media appears to be a practical digital signage partner for branch/counter environments. Product discussions correctly identified the opportunity: help distributors improve in-location marketing effectiveness and measure results, not just install screens.

Their website expands the picture beyond signage hardware. They offer strategy, content management, software, displays, and monetization tools that could help distributors run supplier campaigns, standardize branch messaging, and build better ROI stories.

Evaluation conversations also emphasized measurable outcomes and proof points, integration scope and system-of-record alignment.

Public website materials highlight the company as a one-stop digital signage provider; SavvyDisplays emphasizes campaign/ROI management, while SignJet emphasizes self-service content creation, scheduling, and analytics.

Distributor evaluation should focus on the specific operational pain points the organization is trying to improve (such as weak branch marketing execution and inconsistent messaging; manual campaign management via spreadsheets/email; poor proof-of-performance/roi visibility for supplier-funded campaigns), whether the available capabilities match the required workflow scope (including Digital signage strategy, deployment, and network management; CMS/software for scheduling, updates, and content control (including SignJet); SavvyDisplays ad/campaign management and ROI reporting for signage programs), stakeholder ownership and process fit (for example, Best fit for distributors with branch/counter traffic and active marketing or supplier-program goals, especially marketing leaders, branch ops, merchandising, and supplier program managers), along with integration requirements, implementation approach, and the level of change management needed for adoption.

#### **Solutions / Capabilities for Distributors**

- Digital signage strategy, deployment, and network management.
- CMS/software for scheduling, updates, and content control (including SignJet).
- SavvyDisplays ad/campaign management and ROI reporting for signage programs.
- Content design/management, hardware, installation, and support.

#### **Distributor Problems They Address**

- Weak branch marketing execution and inconsistent messaging.
- Manual campaign management via spreadsheets/email.
- Poor proof-of-performance/ROI visibility for supplier-funded campaigns.
- Lack of internal bandwidth to manage signage content and operations.

#### **Where They Fit / Best Use Cases**

- Best fit for distributors with branch/counter traffic and active marketing or supplier-program goals, especially marketing leaders, branch ops, merchandising, and supplier program managers.

## Virto — B2B eCommerce Platform

Website: <https://virtocommerce.com/>

### Executive Summary

Virto comes across as an enterprise B2B commerce platform provider focused on complex B2B needs, modular architecture, and differentiated customer experience. Product discussions consistently framed them as a platform-oriented provider rather than a basic storefront vendor. That aligns with their website, which emphasizes composable architecture, B2B complexity, and distributor-specific commerce scenarios (contract catalogs, customer-specific pricing, inventory visibility). The strongest distribution fit is companies treating digital commerce as an ongoing business capability.

Product discussions covered solution overview/demo concepts and webinar planning, with shared emphasis on CX, digital commerce strategy, and change management. Evaluation conversations also emphasized adoption and change-management considerations, workflow-specific demos or pilot validation, integration scope and system-of-record alignment.

Public website materials highlight an enterprise B2B innovation platform with 80+ modular capabilities, API-first/headless deployment, and distributor use cases; it also extends into marketplace/procurement scenarios that may matter for advanced ecosystem strategies.

Distributor evaluation should focus on the specific operational pain points the organization is trying to improve (such as legacy/inflexible commerce platforms that limit B2B CX; difficulty integrating commerce with erp and enterprise systems; slow innovation caused by monolithic platforms and one-time-project thinking), whether the available capabilities match the required workflow scope (including Enterprise B2B eCommerce platform for complex pricing/catalogs and multi-region operations; Composable, API-first/headless, cloud-native PaaS architecture with modular capabilities; Distributor-relevant features for contract pricing, customer-specific catalogs, and inventory-driven experiences), stakeholder ownership and process fit (for example, Best fit for mid-to-large distributors/manufacturers with complex B2B requirements and digital/IT maturity (product discussions suggest they often target companies serious about CX and scale, not low-cost site launches)), along with integration requirements, implementation approach, and the level of change management needed for adoption.

### Solutions / Capabilities for Distributors

- Enterprise B2B eCommerce platform for complex pricing/catalogs and multi-region operations.
- Composable, API-first/headless, cloud-native PaaS architecture with modular capabilities.
- Distributor-relevant features for contract pricing, customer-specific catalogs, and inventory-driven experiences.
- Marketplace/procurement marketplace and multi-channel commerce options.

### Distributor Problems They Address

- Legacy/inflexible commerce platforms that limit B2B CX.
- Difficulty integrating commerce with ERP and enterprise systems.
- Slow innovation caused by monolithic platforms and one-time-project thinking.
- Channel inconsistency across portals, sales reps, and digital touchpoints.

**Where They Fit / Best Use Cases** - Best fit for mid-to-large distributors/manufacturers with complex B2B requirements and digital/IT maturity (product discussions suggest they often target companies serious about CX and scale, not low-cost site launches).

## WizCommerce — AI Platform for Modernizing B2B Sales and Operations

Website: <https://wizcommerce.com/>

### Executive Summary

WizCommerce is an AI-first platform built specifically for wholesale distributors that want to modernize how they sell, process orders, and manage customer relationships. Its core offering brings together three connected capabilities: AI-powered order entry and quoting, a wholesale-native B2B ecommerce storefront, and an integrated CRM. Rather than treating these as separate tools, WizCommerce presents them as parts of a broader operating platform designed to work with the distributor's ERP in real time.

For electrical distributors, the clearest value is in reducing the manual effort and process friction that still exist across everyday sales and operations workflows. The profile points to common industry pain points such as purchase orders arriving in inconsistent formats, heavy reliance on manual data entry, complex pricing requirements, and sales teams getting pulled into administrative work instead of customer-facing activity. WizCommerce is positioned to address those issues by automating order capture, supporting faster quoting, enabling customer self-service, and improving access to connected data across functions.

Another important part of the positioning is that WizCommerce can be adopted either as a unified platform or through individual components based on the distributor's priorities. That gives distributors flexibility to address a specific gap, such as order entry automation or ecommerce, without necessarily committing to a full platform change on day one. Overall, the fit appears strongest for distributors that want to modernize

sales and operational workflows with a more connected digital foundation, while avoiding the complexity of stitching together multiple disconnected point solutions.

### Solutions / Capabilities for Distributors

- Ella: AI-driven order entry and quoting assistant that converts purchase orders from multiple formats, including PDFs, handwritten orders, scans, spreadsheets, and voice notes, into structured, ERP-ready sales orders. It extracts key data such as customer information, SKUs, quantities, pricing, and ship-to details, helping reduce manual entry and accelerate quote and order workflows. Reduces processing time from hours to minutes with minimal human review. Also handles RFQs and quote generation, supporting the quote-heavy nature of electrical project sales.
- WizShop: B2B ecommerce storefront designed for wholesale distribution, supporting customer-specific pricing, personalized assortments, live inventory visibility, self-service ordering, bulk ordering, and approval workflows. It is built to handle the pricing and catalog complexity common in electrical distribution. Includes AI-powered search and product recommendations. Ecommerce site implementation under 1 week with Agentic Engine.
- WizCRM: Wholesale-focused CRM that connects with ERP and ecommerce data to support quote creation, order management, customer activity tracking, and AI-based sales prioritization. Features an AI Sales Assistant with natural-language querying — reps can describe what a customer wants and AI builds the quote or order automatically, and much more

### Distributor Problems They Address

- Manual, time-intensive order entry from inconsistent PO formats
- Limited self-service buying options for customers
- Difficulty managing complex pricing and quote structures online
- Disconnected ecommerce, CRM, and order management systems
- Sales teams spending too much time on administrative work instead of selling
- Limited visibility into which customers or opportunities need attention
- Pressure to modernize digital capabilities without long, resource-heavy IT projects

### Where They Fit / Best Use Cases

- Primary buyers: operations leadership, sales management, IT/digital transformation leads, and executive teams
- Distributors looking to modernize order-to-cash workflows across sales and operations
- Electrical distributors handling large volumes of orders from email, fax, PDF, phone, and counter channels
- Organizations that want to reduce manual ERP order entry and speed quote turnaround
- Distributors seeking a modern B2B portal with customer-specific pricing and live inventory visibility
- Companies that want to unify ecommerce, order entry, and CRM on a shared platform connected to their ERP

## Xngage — B2B Commerce Agency & Implementation Services

Website: <https://www.xngage.com/>

### Executive Summary

Xngage is a strategic and consultative B2B ecommerce solution partner that understands distribution businesses deeply. With complementing digital practices for Ecommerce, PIM, and AI, Xngage offers solutions and services helping distributors in their digital transformation journey. From technology selection, UX design, ERP integration, PIM, to digital growth services, Xngage is a strategic partner able to assist distributors not only with implementing digital solutions but with driving meaningful business outcomes. With over 2 dozen electrical distributors as long-term client partners, they deliver unmatched experience working with companies seeking to fortify their ecommerce business, launch punchout solutions, or connect seamlessly to IDEA Connector data. They have integrated Epicor Eclipse, P21, Infor SX.e, CSD, and many other ERP systems countless times and can provide immediate value from the start of the partnership. They are well-suited to both early-stage and more advanced digital commerce programs.

Evaluation conversations also emphasized adoption and change-management considerations, measurable outcomes and proof points, integration scope and system-of-record alignment.

Xngage's website explicitly highlights distributor/manufacturer case studies and references, ERP/content-source integration experience (including AD/IDEA-related references), and services such as on-site search, agentic AI, punchout, and PIM that directly map to the challenges and issues discussed in prior conversations.

Distributor evaluation should focus on the specific operational pain points the organization is trying to improve (such as low ecommerce adoption and weak ROI after platform launches; poor search/findability in complex B2B catalogs; fragmented product data from suppliers/industry content sources), whether the available capabilities match the required workflow scope (including B2B ecommerce strategy i.e. roadmaps, ROI modeling, platform selection); Ecommerce implementation with ERP/process integration and UX design; PIM implementation and product data standardization for distributor/manufacturer content feeds, stakeholder ownership and process fit (for example, best fit for distributors/manufacturers needing a consultative partner across strategy-to-execution, including smaller firms that need an entry path and

larger enterprises pursuing PIM/search/optimization programs and pushing into disruptive custom experiences and innovation), along with integration requirements, implementation approach, and the level of change management needed for adoption.

#### **Solutions / Capabilities for Distributors**

- B2B ecommerce strategy (roadmaps, ROI modeling, platform selection).
- Ecommerce implementation with ERP/process integration and UX design.
- PIM implementation and product data standardization for distributor/manufacturer content feeds.
- Digital growth marketing services with analytics, SEO, GEO, and on-site search services (including contextual/AI-enhanced search).
- Punchout and IDEA Connector integration support.
- Custom Software development and agentic AI to drive innovation and differentiation

#### **Distributor Problems They Address**

- Low ecommerce adoption and weak ROI after platform launches.
- Poor search/findability in complex B2B catalogs.
- Fragmented product data from suppliers/industry content sources.
- Weak analytics maturity and limited behavior/adoption insight.
- Inadequate usability and user experience gaps.

**Where They Fit / Best Use Cases** - Best fit for distributors/manufacturers needing an experienced, consultative, and value-focused partner across strategy-to-execution, including smaller firms that need an entry path and larger enterprises pursuing complex ecommerce/PIM/search/optimization and custom programs.