



helping your customers help themselves



any**where**.



any**time**.



any**device**.

## Who is this guy?

- **From: Greenville, South Carolina**
- **Most call me Pat**
- **Full Name: Patrick Michael Scherz**
- **(go ahead, laugh – I'll wait)**
- **Clemson University – wish I was still there**
- **Background: Business management, marketing, entrepreneurship**
- **Go easy on me? Please? It IS my birthday.**

# About Website Pipeline

# About Website Pipeline

- **Founded 1999**
- **Based in Greenville, SC**
- **Cloud Business Model**
- **Focus solely on ERP-Integrated Front Office / eCommerce**
  - Public / Private Ecommerce Web Stores
  - Customer Self-Service (Portals)
  - Sales Rep Tools
- **500+ Active Customers**
- **65+ On Staff (all US-based)**
- **Profitable, Debt Free**
- **Largest Customer <3% of our Total Revenue**

# Our Target Customer



- Based in NA
- Dist / Mfg
- \$5-\$300 million
- Uses ERP Software
- Most B2B
- Some B2C

# Product Focus

To get, keep, and grow customers.

To perform activities better, faster, and cheaper.

# Video

## Key Benefits of Our Integrated eCommerce Solutions

- **Real-time, bi-directional integration with Sage**
- **Scalability – 700+ modules**
- **Focus on one system of record - Sage**
- **Super User Dashboard**
- **Mobile ready**
- **Cloud-based**
- **24/7 support**
- **Website Pipeline University training videos**
- **Security**



## Front Office – Our 6 “Flavors”

- 1 – Sync Tool Only (API's)
  - 2 – AR Portal
  - 3 – B2B Portal
  - 4 – B2B Portal with public facing catalog
  - 5 – Full B2B and B2C eCommerce website
  - 6 – “Rep” Tools (sales, customer service, high-level real time reporting)
- 
- All Parts – ERP Sync Framework with Cloud Data

# Why?

# The “Injustice” We Are Fighting

- **Customer Service is Stuck in the 1980’s**
  - Phone, Fax, Email
  - One Transaction At a Time
  - Manually take orders and key into ERP
- **No Self-Service Options for**
  - Transactions
  - Inquiries
- **Data is Stuck in Backend Software Systems (ERP)**
  - Answers to Questions
  - Workflows for Transactions

# Solution?

built for:   

Customers & Distribution Channels

# Front Office Business Software Suite

by:  websitepipeline

## FROM ERP

- Customers / Logins
- Addresses
- Products
- Inventory Levels
- Shipments
- Customer Specific Pricing
- Tax Schedules / Codes
- Invoice History
- Sales Order History
- Historical RMAs

## TO ERP

- Sales Orders
- Customers
- CC Transactions
- Addresses
- Invoice Payments
- RMAs

 Sync Tool

Your ERP / Accounting System

Employees & Contractors

Vendors & Supply Chain

# Front Office Business Software Suite

by:  websitepipeline

In The Cloud

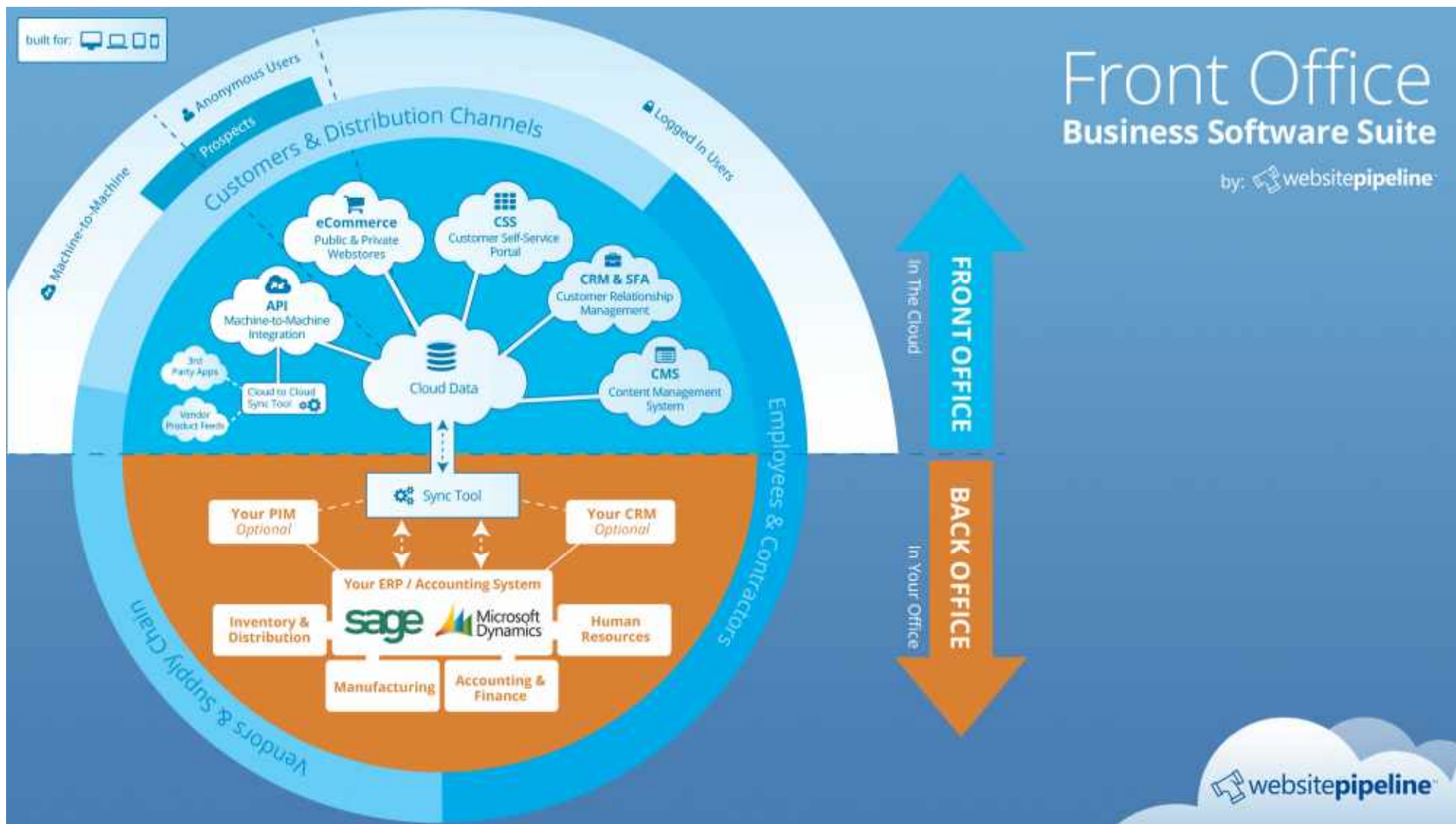
**FRONT OFFICE**

In Your Office

**BACK OFFICE**

 websitepipeline

built for: 



# Front Office Business Software Suite

by:  websitepipeline

FRONT OFFICE

In The Cloud

BACK OFFICE

In Your Office

 websitepipeline



# “People” In A Business



Our focus is here...  
to **GET, KEEP, GROW**

# Ladder of Customer Engagement



Our focus is on TOOLS to help *our* customers climb this ladder with *their* customers.



# AR Portal - Snapshot

## WidgetCo

Username

Password

Sign In

[Create an account](#)

[Request Username](#)

[Request Password Reset](#)

ValidIP: Login wspstest

The screenshot shows the WidgetCo AR Portal dashboard. At the top, there is a navigation bar with a search field, a 'Products' dropdown menu, and a 'GO' button. The user's name 'C. Xavier' and email '@wspstest' are displayed in the top right corner. The main content area features the WidgetCo logo and a grid of seven dashboard tiles: 'Orders' (Track open, backordered, and s...), 'Shipments' (View shipments and track packa...), 'Invoices' (Track open and paid invoices), 'Backorders' (View items on backorder), 'Payments' (View payments applied to invoices), 'Aging Report' (View aging of open invoices), and 'My Account' (View and edit billing, contact, and address info). The footer contains a navigation menu with links for Home, Page 1, Page 2, Page 3, Page 4, Page 5, and Contact. Below the menu, the copyright information reads '©2016 Widget Company, Inc. Ecommerce & ERP Integration by Website Pipeline'.

Search... Products GO C. Xavier @wspstest

## WidgetCo

- Orders**  
Track open, backordered, and s...
- Shipments**  
View shipments and track packa...
- Invoices**  
Track open and paid invoices
- Backorders**  
View items on backorder
- Payments**  
View payments applied to invoices
- Aging Report**  
View aging of open invoices
- My Account**  
View and edit billing, contact, and address info

Home Page 1 Page 2 Page 3 Page 4 Page 5 Contact

©2016 Widget Company, Inc.  
Ecommerce & ERP Integration by Website Pipeline

# WidgetCo

## Sales Orders

Order Date:  to

Status:  Open  Complete

Search  All

Search Clear

Results per page: 50

Tools

COLUMNS: .....

ORDER #	ORDER DATE	STATUS	TOTAL	PO #
W200003	6/28/2016	Complete	\$2,935.98	bill me Omar
W200002	6/28/2016	Open	\$289.99	test
W100001	6/28/2016	Open	\$289.99	wsp test
W100049	3/4/2016	Open	\$2,146.14	78576985786

Showing 1 - 4 of 4 results

1

# WidgetCo

## Shipments

Ship Date:  to

Group By

Search  All

Results per page: 50

COLUMNS: .....

SHIP DATE	SHIP VIA	TRACKING #	ORDER #	INVOICE #	PO #	COMMENT
6/28/2016	MAIL	asdfasdf	W200003	0100188	bill me Omar	asdfasdf

Showing 1 - 1 of 1 results

# WidgetCo

## Invoices

Invoice Date:  📅 to  📅

Status:  Open  Closed

Group By:

Search:  All

Results per page: 50 ▼

COLUMNS: ..... ▼

↕ INVOICE #	↕ INVOICE DATE	↕ STATUS	↕ INVOICE TOTAL	↕ PO #	↕ ORDER #	↕ AMOUNT DUE	↕ DUE DATE	AGING	ACTIONS
0100188	6/28/2016	Open	\$2,935.98	bill me Omar	W200003	\$2,935.98	6/28/2016	21 Days	<input type="button" value="Pay Now"/>

Showing 1 - 1 of 1 results

## My Statement

 Print

### Details

Date	7/19/2016
Customer	00-WSP100 Website Pipeline 555 N. Pleasantburg Drive Ste 214 Greenville, H 29607 PH: 123-123-1234
Credit Limit	\$0.00
Open Orders	\$2,726.12
Credit Status	Good

### Aging Report

Current	\$0.00
Last 30 Days	\$2,935.98
Last 60 Days	\$0.00
Last 90 Days	\$0.00
Over 90 Days	\$0.00
Total	\$2,935.98

## Open Orders

ORDER #	ORDER DATE	PO #	TOTAL
W100001	6/28/2016	wsp test	\$289.99
W100049	3/4/2016	78576985786	\$2,146.14
W200002	6/28/2016	test	\$289.99

**Open Orders Total: \$2,726.12**

# B2B Portal – Snapshot

The desktop interface of the WidgetCo B2B portal features a dark grey navigation sidebar on the left with a 'Menu' header and a lock icon. The menu items include: Product Lists, Ordering, Orders & Shipments, Invoices, Payments & Credits, Returns & Claims, Reports, and Support & Resources. The main content area is white and displays the 'WidgetCo' logo at the top. Below the logo is a grid of nine functional widgets: Shop (Search and brows...), Price List (Check product pri...), Favorites Lis... (View and manage...), Quick Order (Place orders using...), Orders (Track open, backo...), Shipments (View shipments a...), Invoices (Track open and pa...), Payments (View payments ap...), and My Account (View and edit bill...). At the bottom of the page, there is a footer with navigation links (Home, Page 1, Page 2, Page 3, Page 4, Page 5, Contact), copyright information (©2015 Widget Company, Inc.), and a note about Ecommerce & ERP integration by Website Pipeline.

The mobile interface of the WidgetCo B2B portal is shown in a vertical orientation. At the top, there is a navigation bar with a hamburger menu, a home icon, a search icon, and a user profile icon. Below this is a prominent orange banner displaying 'Sales Today \$6,964'. The main content area includes a 'Sales History' section with a line graph showing sales trends over a 12-month period (Jan to Dec). Below the graph is an 'Aging' section with a table showing 'Current' sales at \$1,520,200 and '30 Days' sales at \$552,896. At the very bottom, there is a promotional banner that reads 'Buy 2 more items on 3WID104 to get 1'.

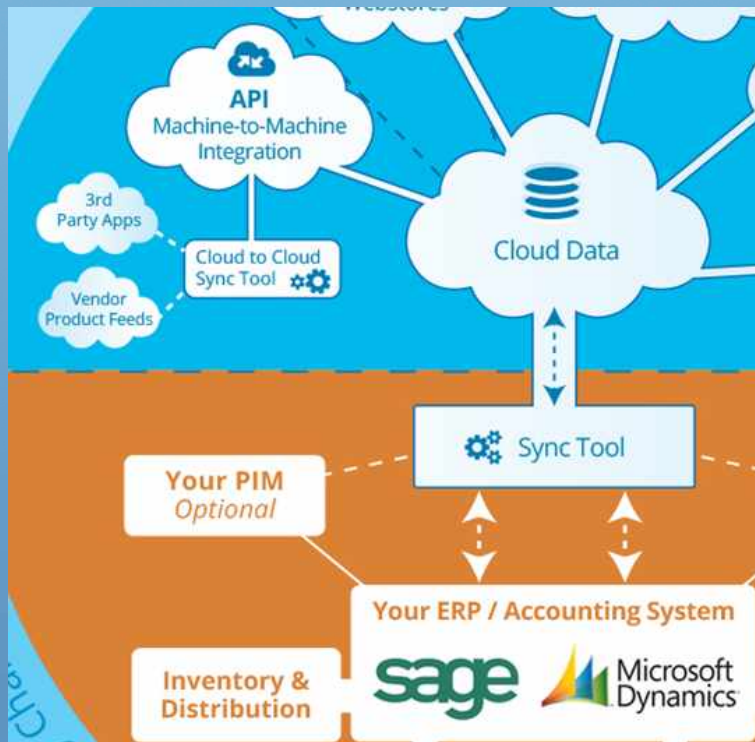
# Public and Private Web Stores - Snapshot

The screenshot shows the homepage of a web store named "WidgetCo". At the top, there is a navigation menu with links for "Home", "Page 1", "Page 2", "Page 3", "Page 4", "Page 5", and "Contact". Below the menu is the "WidgetCo" logo. A search bar is located to the left of the "SIGN IN" and "SHOPPING CART" (with a 0 item icon) links. The main content area features a large banner image of a hand pointing at a tablet displaying charts. Below the banner is a text block with the heading "Excepteur sint occaecat cupidatat" and a "More Info" button. At the bottom, there are four product thumbnails, each with a circular icon and a title: "Gadget L - Stand-Alone Product (dangerous)", "Widget D - Parent with Input Qty View", "Widget G - Parent with Four Choices", and "Widget A - Parent with One Choice".

The screenshot shows a product detail page for a gadget. At the top, there is a large image of the gadget with a "View Larger" button. Below the image are four smaller images showing different views of the gadget. The product information includes: SKU: GADL, Category: Gadgets, Brand: ABC Company, and Downloads: MSDS (pdf) and Sales Flyer (doc). The price is listed as \$102.78, with a list price of \$205.55 and a "You Save: 50.00%" discount. The product is ordered from the "CENTRAL WAREHOUSE" and has "40 In Stock". A quantity selector is set to "1", and there is an "Add to Cart" button.



# API (for machine-machine integration)



## GET Methods

A "GET" allows you to retrieve one or more existing resources from a collection of resources in the website platform.

All API GET methods are called using the following base URL, and typically follow three standard format patterns.

**Base Request URL**

```
https://[domainid].uk/api/v2/sage.com/website/extension/url/api/
```

**GET Method URL Formats**

- `https://[api-method-1]`  
Retrieves all resources from the collection(s) accessed with the scope of the method. GET methods may have built-in filters to reduce the results returned from the collection(s) being accessed.  
**Example** URL that gets resources from the products collection where the product category is property is `category`.  

```
https://[domainid].uk/api/v2/sage.com/website/extension/url/api/products/category
```
- `https://[api-method-1]?[property]=value`  
Only returns resources where the resource property specified by the GET method matches the value provided in the URL. The property used to filter the data collection is specified in the method's documentation.  
**Example** URL that gets resources from the products collection where the status property is 1 and the name(s) property starts with the letter "G".  

```
https://[domainid].uk/api/v2/sage.com/website/extension/url/api/products/status/1/name/G*name/G*name/G*
```
- `https://[api-method-1]?[filter]=value`  
Applies a complex filter to the request results based on the [SearchString](#) provided. See supported [SearchString](#) commands for more information on how to use SearchString.  
**Example** URL that returns all resources from the products collection where the status property is 1 and the name(s) property starts with the letter "G".  

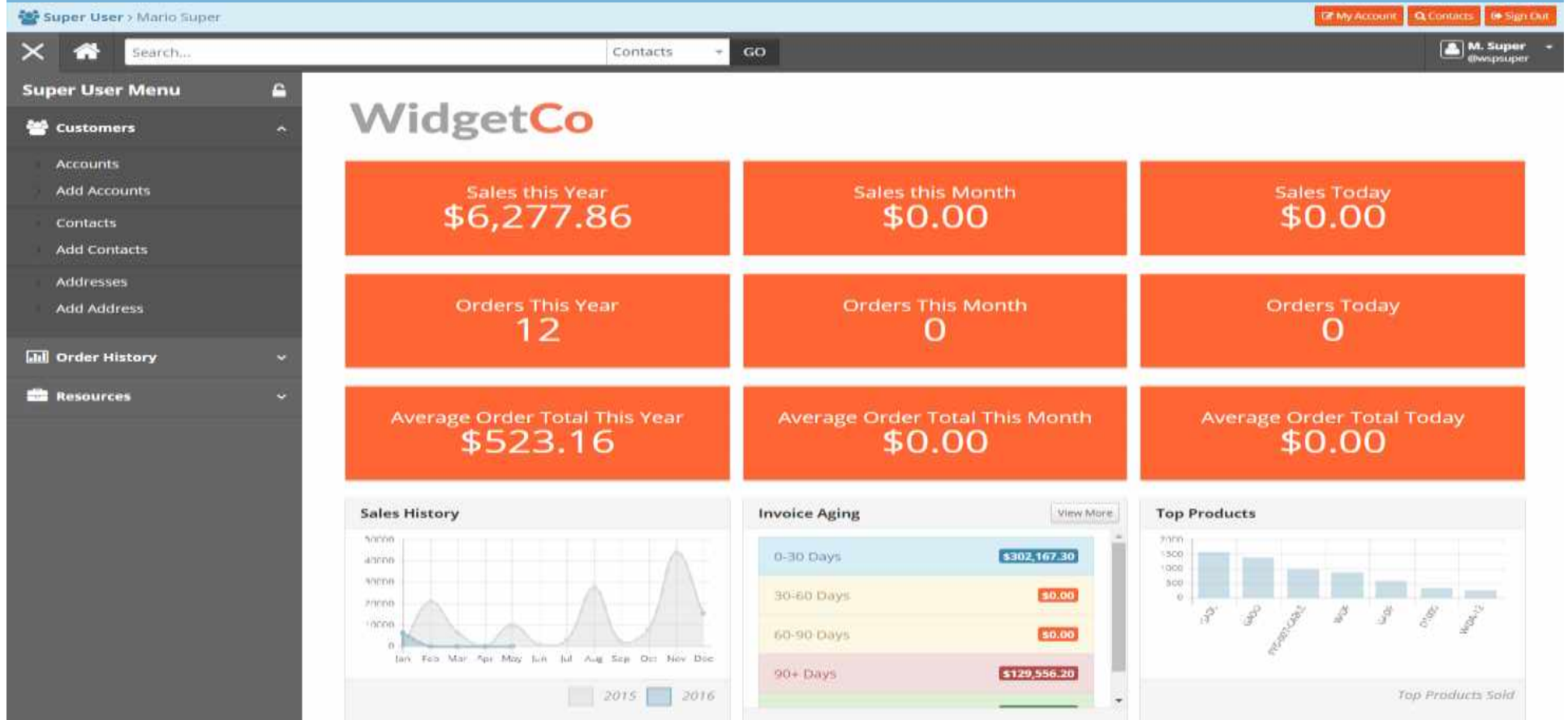
```
https://[domainid].uk/api/v2/sage.com/website/extension/url/api/products/status/1/name/G*name/G*name/G*
```

Some GET methods may require a `Cookie` request header in addition to the `Authorization` header. Depending on the method, the session linked to the token passed in the request may be required to be logged into a website user account. Reference the GET method's documentation for what header type is required for that method. For information on how to get a session (open and log) into a website session using the API, see the special calls [Session Create](#) and [Session Login](#).

### Customer Accounts



# “Rep” Tools (sales, customer service, management)



# Control Panel / CMS

- API Manager
- Contact Us
- Customer Manager
- Data Moves
- Data Sets
- Data Uploads and Downloads
- Directory
- Email + Friend Tracking
- ERP External Orders
- Faceted Search System
- Favorite Lists
- Form Builder 3.0 (Admin)
- FTP Locations
- Geographic Locations
- Global Website Settings
- Images and Files
- Inventory Management
- Keyword Search Log
- Merchant Services
- Navigation System
- Order and Ship Date Calculations
- Order Manager**
- Coupons

## Manage Orders

You have failed orders that need your attention.

Order Date:  to

Exported:  Yes (1)  No (0)

Import Status:  Pending  Success  Failed

Search  All

Search Clear

Results per page: 50

Showing 1 - 50 of 129 results

Page 1 2 3 > >>

Order #	Order Date	Order Total	Username	Account	Exported	Import Status	Actions
100138	10/6/2014 6:35:25 PM	\$469.00	cainb01	Matthew Tingen (00-WSP100)	No	pending	<a href="#">Detail</a>   <a href="#">Edit</a>
100137	10/6/2014 6:12:24 PM	\$300.40	cainb01	Matthew Tingen (00-WSP100)	No	pending	<a href="#">Detail</a>   <a href="#">Edit</a>
100136	10/6/2014 6:06:35 PM	\$199.90	cainb01	Matthew Tingen (00-WSP100)	No	pending	<a href="#">Detail</a>   <a href="#">Edit</a>
100135	10/6/2014 5:48:48 PM	\$3,000.25	cainb01	Matthew Tingen (00-WSP100)	No	pending	<a href="#">Detail</a>   <a href="#">Edit</a>
100134	9/30/2014 9:03:29 AM	\$3,193.52	edtest	WSP Test (00-W001388)	No	pending	<a href="#">Detail</a>   <a href="#">Edit</a>
100133	9/29/2014 2:22:11 PM	\$1,440.37	kbrown	Matthew Tingen (01-ABF)	No	pending	<a href="#">Detail</a>   <a href="#">Edit</a>
100132	9/24/2014 11:05:13 AM	\$1,391.34	wsptest	Matthew Tingen (00-WSP100)	Yes	failed	<a href="#">Detail</a>   <a href="#">Edit</a>   <a href="#">Export Again</a>
100131	9/23/2014 11:16:28 AM	\$159.73	kbrown	Matthew Tingen (01-ABF)	Yes	failed	<a href="#">Detail</a>   <a href="#">Edit</a>   <a href="#">Export Again</a>
100130	9/23/2014 11:10:29 AM	\$158.23	kbrown6	Website Pipeline (00-W000065)	Yes	failed	<a href="#">Detail</a>   <a href="#">Edit</a>   <a href="#">Export Again</a>
100129	9/23/2014 11:02:23 AM	\$1,440.37	kbrown	Matthew Tingen (01-ABF)	Yes	failed	<a href="#">Detail</a>   <a href="#">Edit</a>   <a href="#">Export Again</a>
100128	9/22/2014 3:24:43 PM	\$2,682.05	kbrown	Matthew Tingen (01-ABF)	Yes	failed	<a href="#">Detail</a>   <a href="#">Edit</a>   <a href="#">Export Again</a>
100127	9/18/2014 3:03:07 PM	\$149.99	zz_newaccount_FBFE67D94754150AFCF9AF001921E5E	TEST TEST (00-W000059)	Yes	failed	<a href="#">Detail</a>   <a href="#">Edit</a>   <a href="#">Export Again</a>
100126	9/18/2014 10:31:45 AM	\$1,388.22	cainb01	Matthew Tingen (00-WSP100)	Yes	failed	<a href="#">Detail</a>   <a href="#">Edit</a>   <a href="#">Export Again</a>

Huge Thanks to All DM2 and WSP Customers!

Email me if you have any questions or requests!  
[pat.scherz@websitepipeline.com](mailto:pat.scherz@websitepipeline.com)

# Accolades



In a very small group of privately held, bootstrapped, profitable companies on list



5 Years in a Row!





helping your customers help themselves



any**where**.



any**time**.



any**device**.