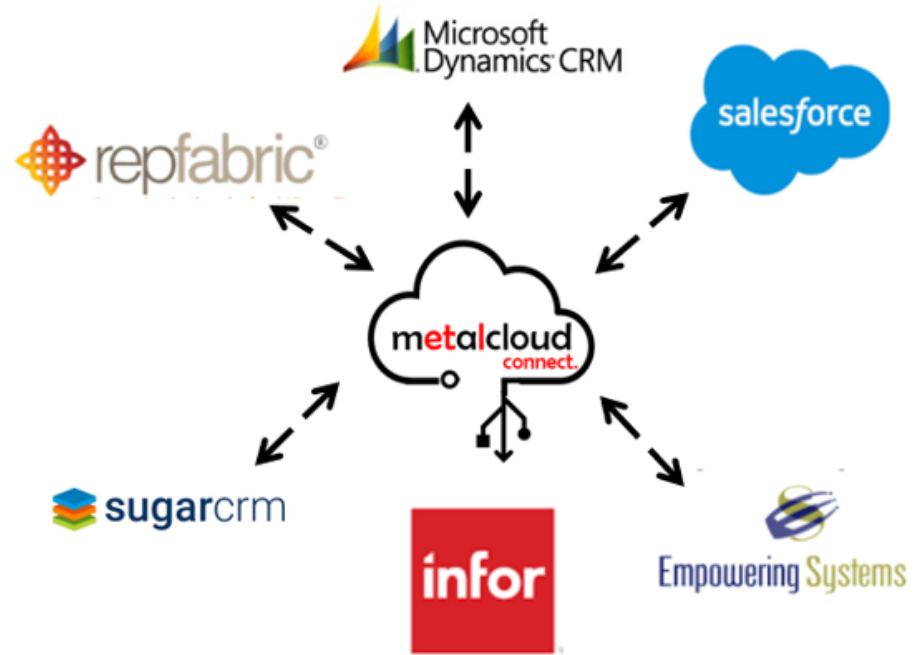


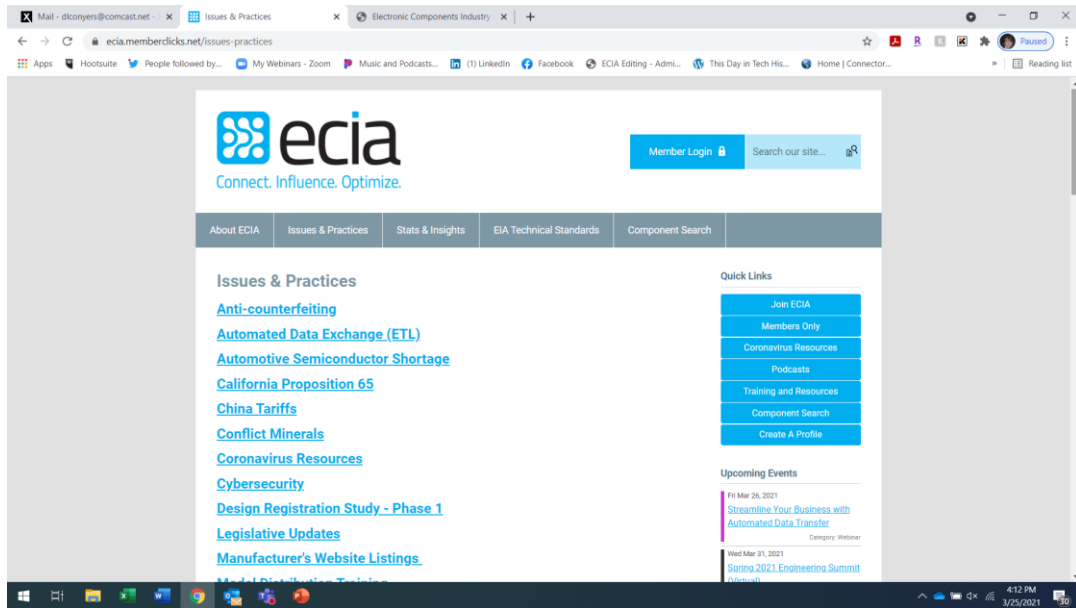
# Automated Data Exchange Initiative

Independent Manufacturer Rep Council



# Automated Data Exchange Information Page

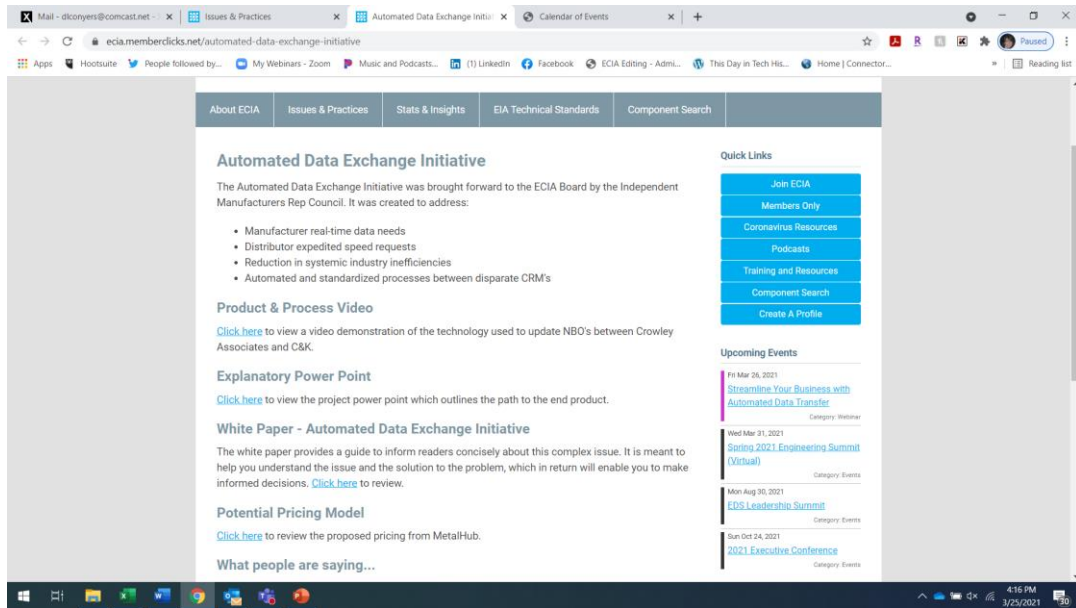
- Visit [www.ecianow.org](http://www.ecianow.org)
- Click on the **Issues & Practices** Tab
- Click on **Automated Data Exchange**



Connect. Influence. Optimize.

# Automated Data Exchange Resources

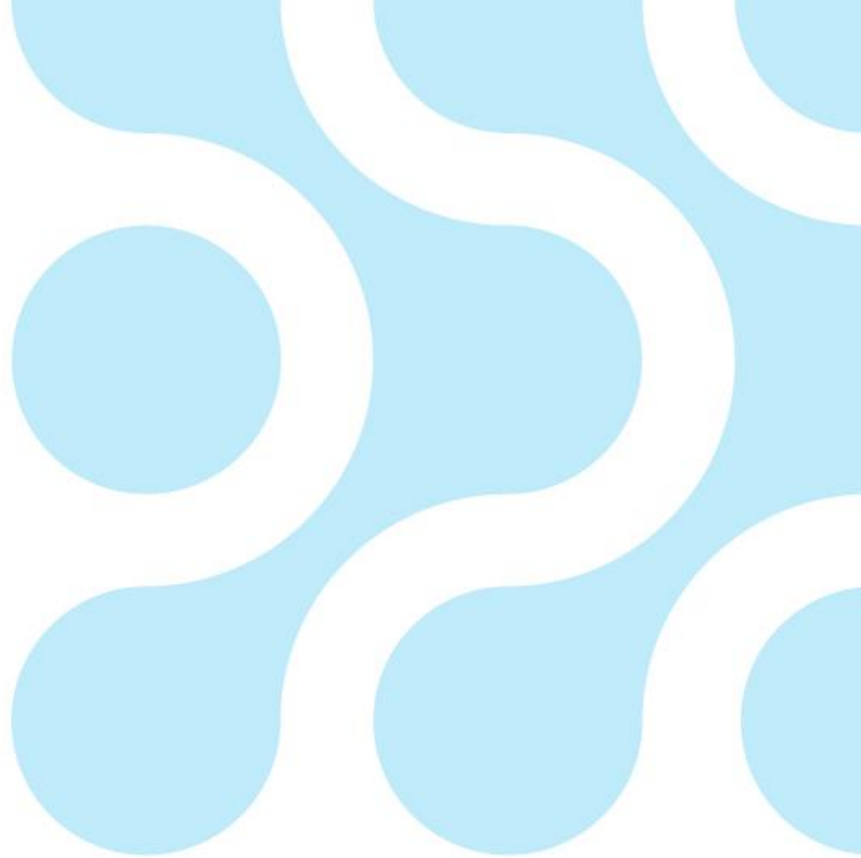
- Video
- Power Point
- White Paper
- Pricing Information



Connect. Influence. Optimize.

## Panelists:

- Alan Ahern, Crowley Associates
- John Zazverskey, C&K Americas
- Peter Heigis, mETaL Corp



# Initiative Considerations

- ECIA approved groundbreaking automated data exchange.
- Created to address the need for:
  - Manufacturer real-time data needs
  - Distributor expedited speed requests
  - Reduction in systemic industry inefficiencies
  - Automated and standardized processes between disparate CRM's
- We believe that identifying this POC on the ECIA's web site would be a benefit and value to existing and additional members.

# ECIA Initiative Deliverables

- White Paper: (<https://www.themetalcloud.com/legal/white-paper>)
- Creative Content Creation: (<https://www.themetalcloud.com/aboutmetal>)
- Multi CRM POC: (<https://www.themetalcloud.com/live-demo> )
- Centralized Community Portal: (<https://support.themetalhub.org>)

Connect. Influence. Optimize.

# ECIA Initiative Requirements



SENSITIVE DATA  
NEVER IS STORED  
IN THE CLOUD



NO STRUCTURAL  
CHANGES  
REQUIRED TO CRM



LIMIT VENDOR  
“LOCK IN”



SECURE  
TRANSMISSION OF  
DATA



CAN BE USED WITH  
ANY CRM (ON  
PREMISE OR  
CLOUD)



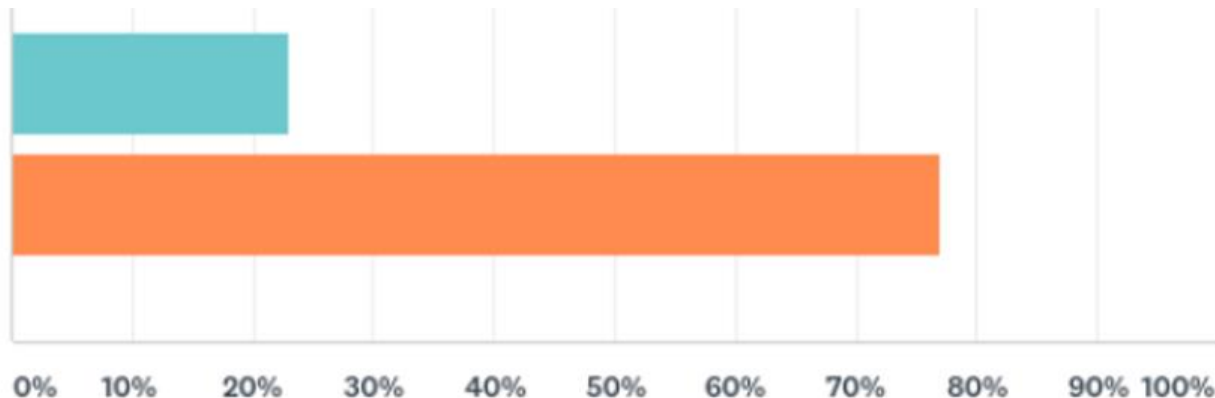
SCALABLE

Connect. Influence. Optimize.

## Initiative Interest

Question  
1.

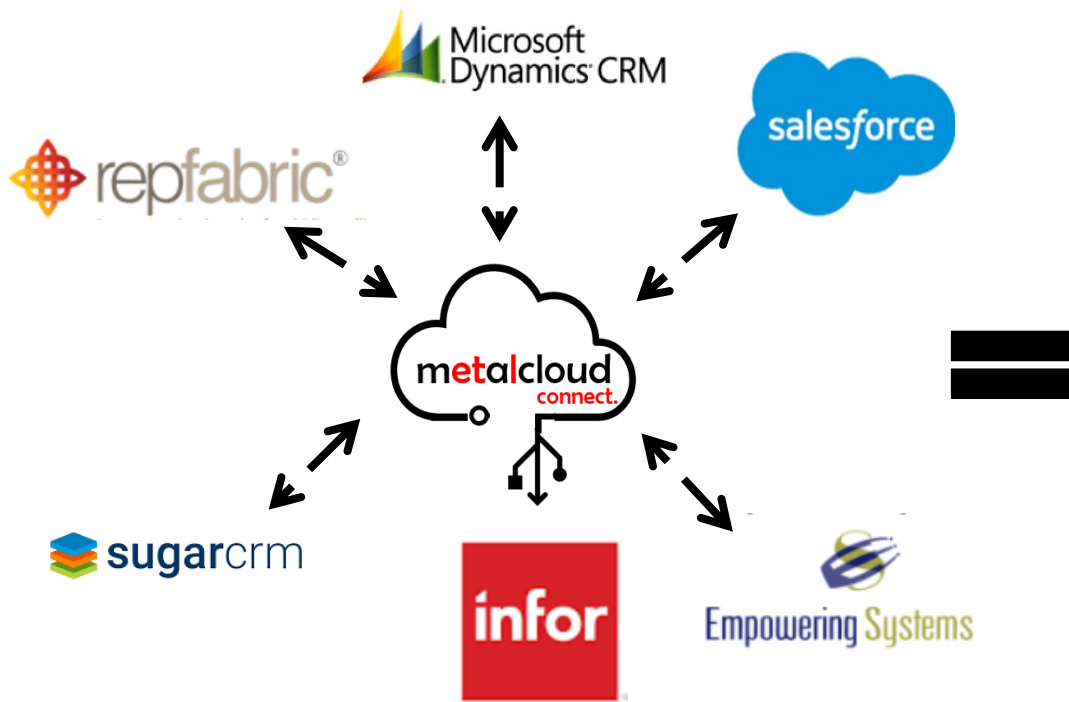
My company would consider a solution that automates the transfer of data between Rep & Supplier CRM, such as NBO data, to be:



Connect. influence. Optimize.



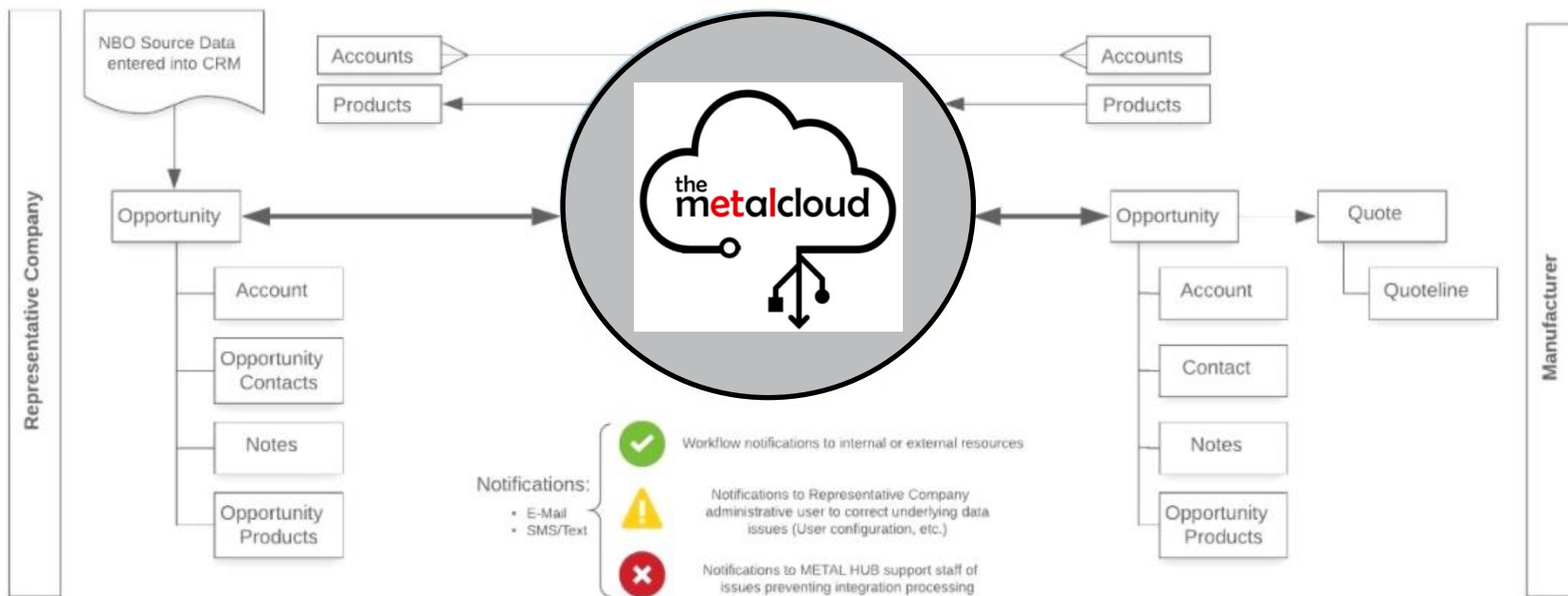
# ECIA Proof of Concept (POC)



- BiDirectional
- Account Mapping
- Flexible Sync Scheduler
- Per NBO Selective Sync
- Scalable Cloud Architecture
- Up to Date Product & Price Book

Connect. Influence. Optimize.

# Protocol Blue-Print



Connect. Influence. Optimize.

# Flexible Trigger Sync Options

Opportunity - Indoor Unit

Q Lookup Results Abracon Open Opps Dialight Open Opps Inside Open Opps Detail Inside Open Opps High

Opportunity Detail

Application or End Product: Indoor Unit

Principal: C&K Components... Q Status: Open

Customer: Perimeter Techno... x Q Est. Close: 3/7/2021

Program: x Q Actual Close:

Distributor: x Q Top Opp ID: JB1-98

Contract Manufacturer: x Q Principal #:

Account Manager: DaMour, Tom Q NBD: ☐

Line Manager: Benoit, Jessica Q Manufacturer Account: perimeter technol... Q Sync with Manufacturer: ☒

Comments: newest opportunity for perimeter tech/invisible fencing

## Examples

1. ☒ Sync / No Sync

2. Commit (90-95 Percent)

Pipeline (5-50 Percent)

Upside (50-70 Percent)

✓ Commit (90-95 Percent)

3. Text Value = "NBO Ready"

Connect. Influence. Optimize.

# The Results



Community Knowledge Base



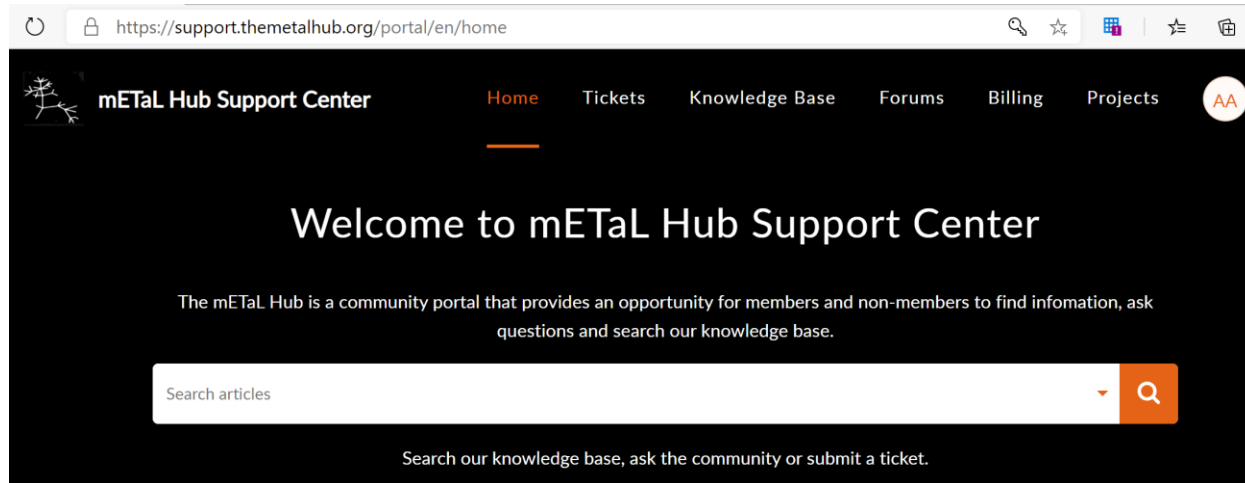
Subscription Management



Support Ticketing System



Social Forum



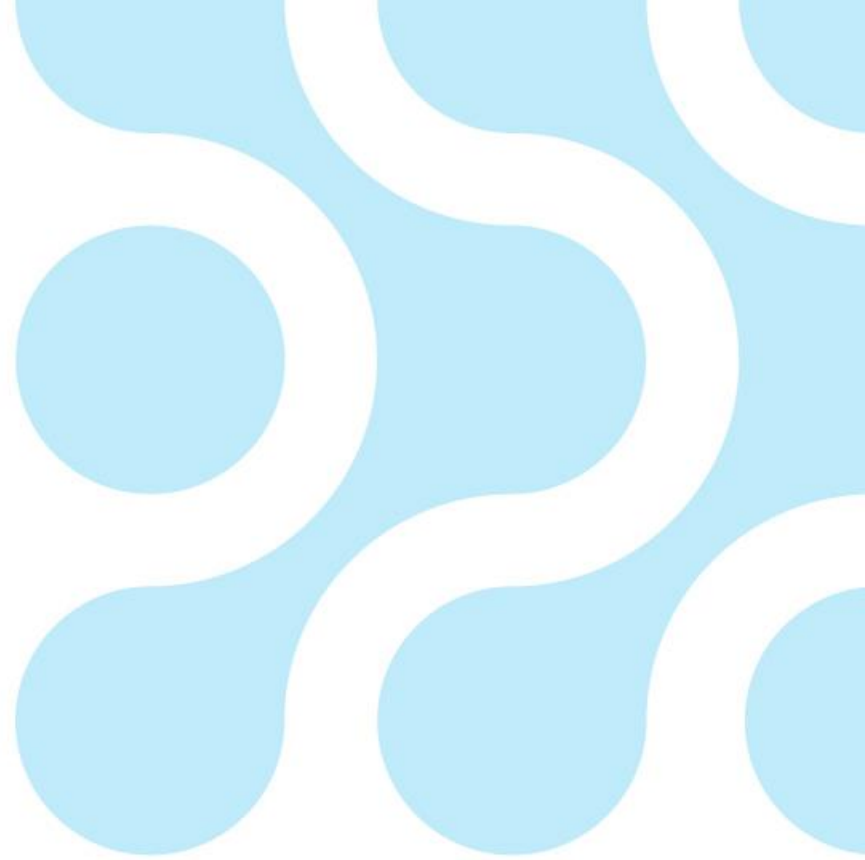
Connect. Influence. Optimize.



A Protocol

## Next Steps - Other Opportunities to Automate

- Special Price requests
- Design registrations
- Distributor to Manufacturer CRM systems for NBO tracking



<https://www.themetalcloud.com/learnaboutmetal>

The screenshot shows a web browser window with the URL <https://www.themetalcloud.com/learnaboutmetal>. The browser's address bar and tabs are visible at the top. The website's header includes the MetalCloud logo, navigation links for 'the platform', 'support', and 'resources', and a red 'start: metal'n' button. Below the header, a large black banner contains the text 'tired of entering data in multiple locations? synchronize your systems today!'. Underneath this banner is a white registration form with the following fields: 'Company Name \*', 'Full name \*' (split into 'First' and 'Last' input boxes), 'Website', and 'Email \*'. The Windows taskbar is visible at the bottom of the screen.

Electronic Components Industry | Board of Directors & Councils | Webinar Information - Zoom | LearnAboutMetal - The mEtAl Cl

themetalcloud.com/learnaboutmetal

Apps | Hootsuite | People followed by... | My Webinars - Zoom | Music and Podcasts... | (1) LinkedIn | Facebook | ECIA Editing - Admi... | This Day in Tech His... | Home | Connector... | Reading list

info@themetalcloud.com | (833) 747-0207

metalcloud

the platform | support | resources | start: metal'n

tired of entering data in multiple locations?  
synchronize your systems today!

Company Name \*

Full name \*

First Last

Website

Email \*

12:33 PM  
3/26/2021

# Thank You!

