INDUSTRIAL DISTRIBUTION

What an AI agent looks like on the job

Twenty-one screens across the six areas where distributors spend the most time. Each one runs on the systems you already have, and a person approves anything that commits money or reaches a customer.

1	Product data and catalog	Screens 1 to 3
2	Order intake	Screens 4 to 7
3	Inventory and purchasing	Screens 8 to 11
4	Pricing and market intelligence	Screens 12 to 14
5	Sales and customer service	Screens 15 to 18
6	Billing, receivables, and rebates	Screens 19 to 21

PREPARED BY

Mahesh Swami, WSI Swami Group

READ WITH

AI that pays back in distribution, our six case studies

INSIDE

21 screens on desktop and phone, shown with sample data

INDEX

Twenty-one screens across six areas

EVERY SCREEN SHOWS SAMPLE DATA

Product data and catalog

1 Catalog cleanup and enrichment — CASE 01
2 New item setup from supplier files — READY TO SCOPE
3 Part number cross-reference — READY TO SCOPE

Order intake

4 Jobs, contracts, and invoices platform — CASE 03
5 Purchase order intake — PATTERN 03
6 Order exception triage — READY TO SCOPE
7 Order status replies — READY TO SCOPE

Inventory and purchasing

8 Stock position watch — READY TO SCOPE
9 Velocity classes on a schedule — READY TO SCOPE
10 Supplier quote comparison — READY TO SCOPE
11 Replenishment suggestions — READY TO SCOPE

Pricing and market intelligence

12 Competitor price tracking — CASE 02
13 Contract price checks — PATTERN 03
14 Quote builder — READY TO SCOPE

Sales and customer service

15 Call and email intelligence — CASE 02
16 Lead scoring and routing — CASE 05
17 Open quote follow-up — READY TO SCOPE
18 Branch and location pages — CASE 06

Billing, receivables, and rebates

19 System-to-system billing bridge — CASE 04
20 Collections priorities — READY TO SCOPE
21 Rebate and claim tracking — READY TO SCOPE

CASE

7 screens show delivered work. The build was delivered for a client in the companion case studies. The screen shows it on sample data.

PATTERN

2 screens are built on a delivered pattern. The same approach as Case 03, applied to a new process.

READY TO SCOPE

12 screens are ready to scope. Shaped to your systems in a first build. Not yet delivered for a distributor.

An item master cleaned up and written for the web

CASE 01 SAMPLE DATA

Catalog Studio

SAMPLE INDUSTRIAL SUPPLY
Catalog Studio

Review queue | Item master | Attributes | Published

Item master synced overnight

KO

18,420	6,140	1,260	94%
Items in the item master	Rewritten and approved	Completed this week	Attribute completeness, up from 71%

Review queue — Drafts waiting for approval

ITEM	AS IT WAS SET UP	STATUS
BRG-6205-2RS	BRG 6205 2RS 25X52X15	DRAFT READY
BLT-B48	V-BELT B48 CLASSIC	DRAFT READY
HCS-G8-0513-2	HHCS 1/2-13X2 GR8 ZP	DRAFT READY
HYD-H08-2W	HOSE HYD 1/2 2W PER FT	NEEDS DATA
GLV-A4-L	GLOVE CUT A4 NIT L	APPROVED
WLD-70S6-035	WIRE MIG .035 70S6 33#	APPROVED
PMP-SEAL-KIT	SEAL KIT PUMP STD	APPROVED

BRG-6205-2RS Bearings · Sold each — DRAFT READY

BEFORE
BRG 6205 2RS 25X52X15

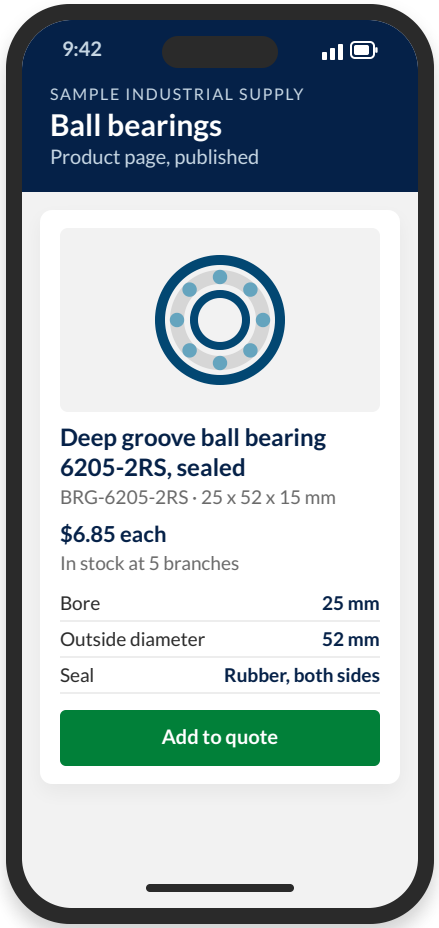
AFTER
Deep groove ball bearing 6205-2RS, sealed both sides, 25 x 52 x 15 mm
A sealed bearing for electric motors, pumps, and conveyors. Rubber seals on both sides keep grease in and dirt out.

Bore	25 mm	Outside diameter	52 mm	Width	15 mm
Seal	Rubber, both sides	Unit	EA (each)	Category	Ball bearings

✓ Title ✓ Description ✓ Specs ✓ Search terms ✓ 3 images re-tagged

12 of 12 elements written

✓ Approve and publish | Edit | Send back



WHAT IT DOES

Standardizes descriptions, attributes, and units of measure across the item master, and writes web-ready copy for every item.

ON THE PHONE

Each approved item publishes as a product page buyers can find, with specs, copy, and re-tagged images.

PEOPLE STAY IN CHARGE

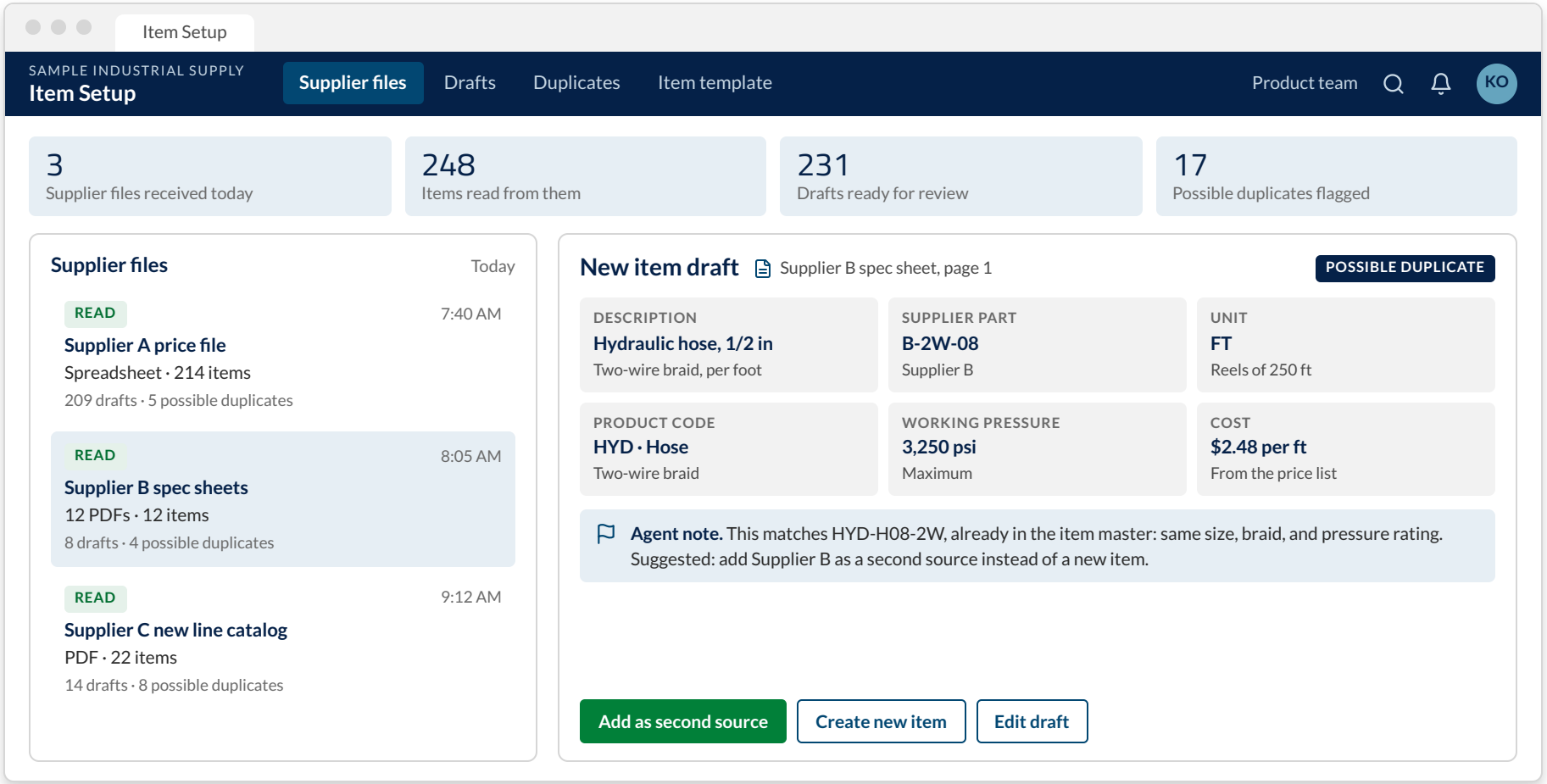
The engine drafts. Your product team approves each item before it reaches the ERP or the website.

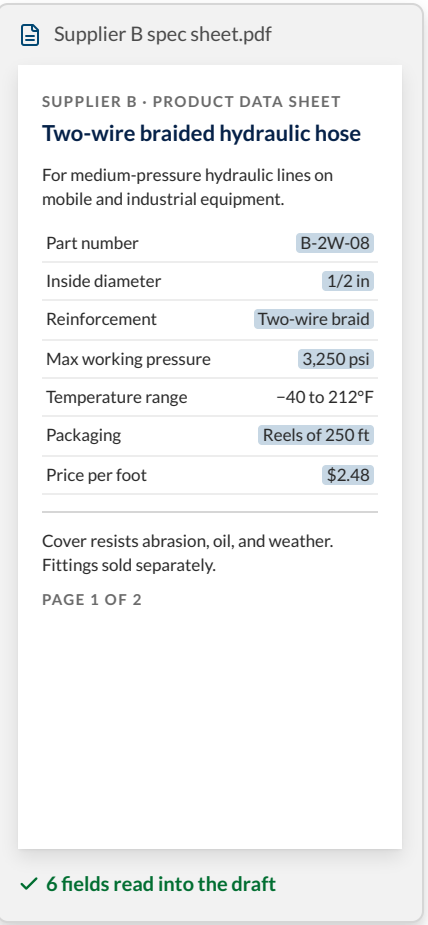
PROOF

CASE 01 Delivered for Interwest, a road safety equipment supplier: 900 product pages rebuilt in 20 business days, 12 elements each.

Supplier files turned into new items, ready for review

READY TO SCOPE SAMPLE DATA





WHAT IT DOES

Reads supplier spec sheets and price files, fills your item template and product coding, and flags likely duplicates.

THE SOURCE DOCUMENT

The supplier's own sheet stays beside the draft, with every field it was read from marked.

PEOPLE STAY IN CHARGE

Nothing enters the item master until the product team approves it. Duplicates are flagged, never merged on their own.

PROOF

READY TO SCOPE Shaped to your item template and product coding in a first build. We measure setup time per SKU and coding errors.

Any part number matched to your item, with a substitute

READY TO SCOPE SAMPLE DATA

Cross Reference

SAMPLE INDUSTRIAL SUPPLY
Cross Reference

Look-ups | Customer lists | Competitor lists | Substitutes

Inside sales JM

41,200	93%	318	12
Outside part numbers on file	Matched to your items	Look-ups today	Substitutes offered today

Look-ups today Newest first

PART NUMBER ENTERED	FROM	YOUR ITEM	MATCH	STOCK NEARBY
ER70S6 .035 33LB	Web quote request	WLD-70S6-035	97%	Out at Riverside
6205-2RSH	Competitor B catalog	BRG-6205-2RS	98%	1,240 at Central DC
RM-44-0912	Ridgeline Mechanical list	BRG-6205-2RS	CONFIRMED	1,240 at Central DC
B48 V BELT	Counter, Riverside	BLT-B48	96%	36 at Riverside
GLV CUT A4 SZ 9	Harbor Fabrication email	GLV-A4-L	91%	410 at Northgate
1/2-13X2 HHCS GR8	Tri-County PO 2291-B	HCS-G8-0513-2	CONFIRMED	9,800 at Eastport

ER70S6 .035 33LB 97% MATCH

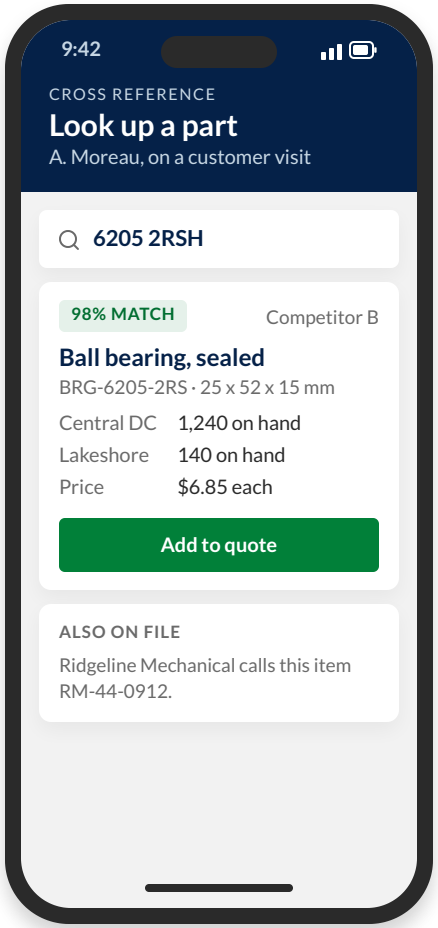
YOUR ITEM
WLD-70S6-035 · MIG wire, 0.035 in, 33 lb spool

- ✓ Same alloy: ER70S-6
- ✓ Same diameter: 0.035 in
- ✓ Same spool: 33 lb

Riverside **0** on hand
Central DC 64
Lakeshore 22

⇄ **Substitute in stock.** Riverside has the same wire on 11 lb spools: 3 spools of WLD-70S6-035-11.

Add to quote | Use substitute



WHAT IT DOES

Matches customer and competitor part numbers to your items, and suggests a substitute when an item is out of stock.

ON THE PHONE

An outside rep types the number off a worn part and sees your item, stock by branch, and the price.

PEOPLE STAY IN CHARGE

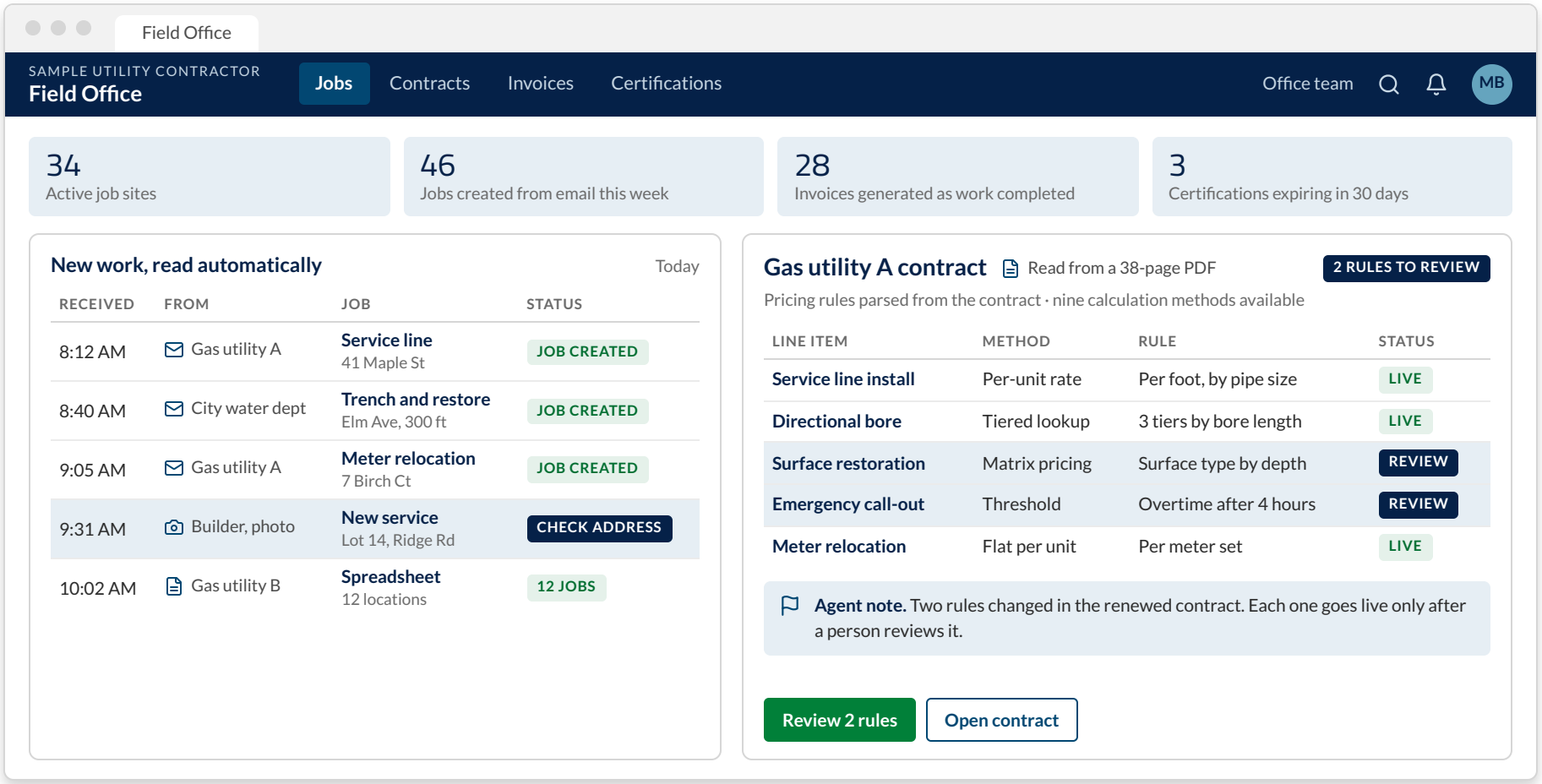
Reps confirm each match before it goes on a quote. Confirmed matches are saved for the next one.

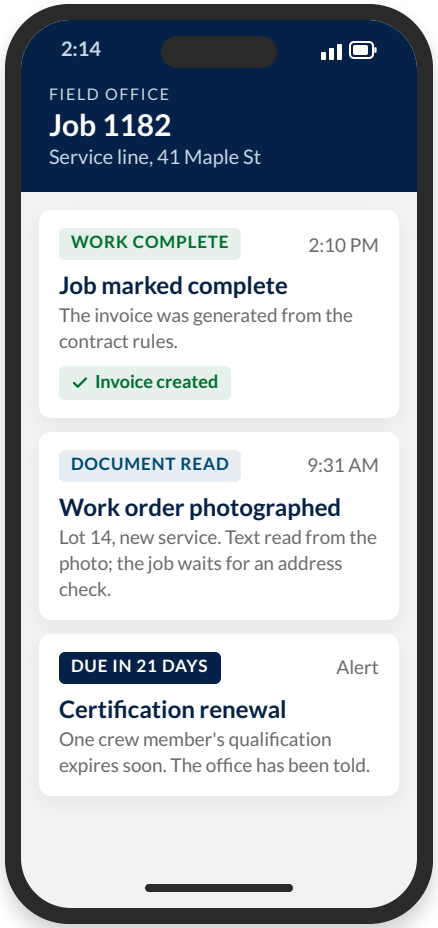
PROOF

READY TO SCOPE Shaped to your item master and customer part lists in a first build. We measure match rate and time per quote.

Jobs, contracts, and invoices on one platform

CASE 03 SAMPLE DATA





WHAT IT DOES

Reads inbound emails into jobs, imports spreadsheets and photographed documents, and parses contract PDFs into pricing rules.

ON THE PHONE

Field crews see each job on site. Documents they photograph are read in, and invoices generate as work is completed.

PEOPLE STAY IN CHARGE

Rules read from a contract go live only after a person reviews them. Alerts arrive before a certification expires.

PROOF

CASE 03 Delivered for a utility installation contractor: 30 to 38 hours a week returned, 60% of manual work removed.

Purchase orders read, matched, and staged for approval

PATTERN 03 SAMPLE DATA

Order Desk

SAMPLE INDUSTRIAL SUPPLY
Order Desk

Intake queue | Exceptions | Staged in ERP | Rules

Today, 9:42 AM JM

38	29	6	3
Purchase orders received today	Matched and ready to approve	Need a person to review	On credit hold

Intake queue

All sources, newest first

SOURCE	CUSTOMER AND PO	LINES	VALUE	STATUS
Email	**Harbor Fabrication** PO 44817	12	$8,412.60	READY
Fax	**Tri-County Plant Services** PO 2291-B	4	$1,038.40	REVIEW
PDF	**Ridgeline Mechanical** PO RM-10522	27	$19,880.15	READY
Email	**Westbrook Pump & Valve** PO 7730	6	$2,145.90	CREDIT HOLD
Portal	**Lakeview Food Processing** PO LFP-3318	9	$4,402.75	READY
Fax	**Pinecrest Packaging** PO 88104	3	$611.40	REVIEW

PO 2291-B

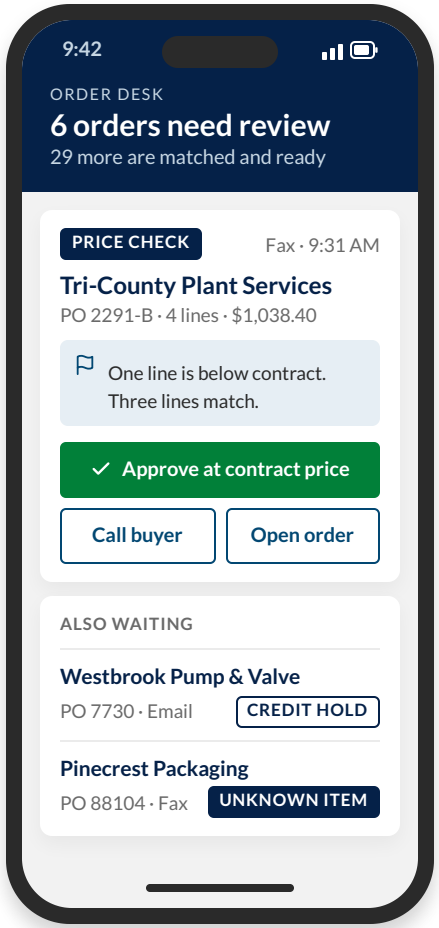
Received by fax · ✓ Ship-to matched · NEEDS REVIEW

Tri-County Plant Services · Account 10442 · Plant 2 receiving dock · Read in 40 seconds

CUSTOMER PART	MATCHED ITEM	QTY	CONTRACT	PO PRICE	CHECK
6205 2RS BRG	**BRG-6205-2RS** Ball bearing, sealed	24 EA	$6.85	$6.85	✓ Match
V-BELT B48	**BLT-B48** Classic V-belt	10 EA	$14.20	$14.20	✓ Match
GLV CUT A4 L	**GLV-A4-L** Cut-resistant glove, large	12 DZ	$58.40	**$54.00**	PRICE
HHCS 1/2-13X2 GR8	**HCS-G8-0513-2** Hex cap screw, grade 8	200 EA	$0.42	$0.42	✓ Match

Agent note. Line 3 is $4.40 a dozen below contract C-118. Suggested: approve at the contract price and send the buyer a short note.

✓ Approve at contract price | Edit order | Draft note to buyer | 4 lines · **$1,091.20**



WHAT IT DOES

Reads each purchase order from email, fax, PDF, or portal, matches part numbers, contract prices, and ship-to, and stages it in the ERP.

ON THE PHONE

The inside sales manager clears exceptions between meetings: approve at the contract price, call the buyer, or open the order.

PEOPLE STAY IN CHARGE

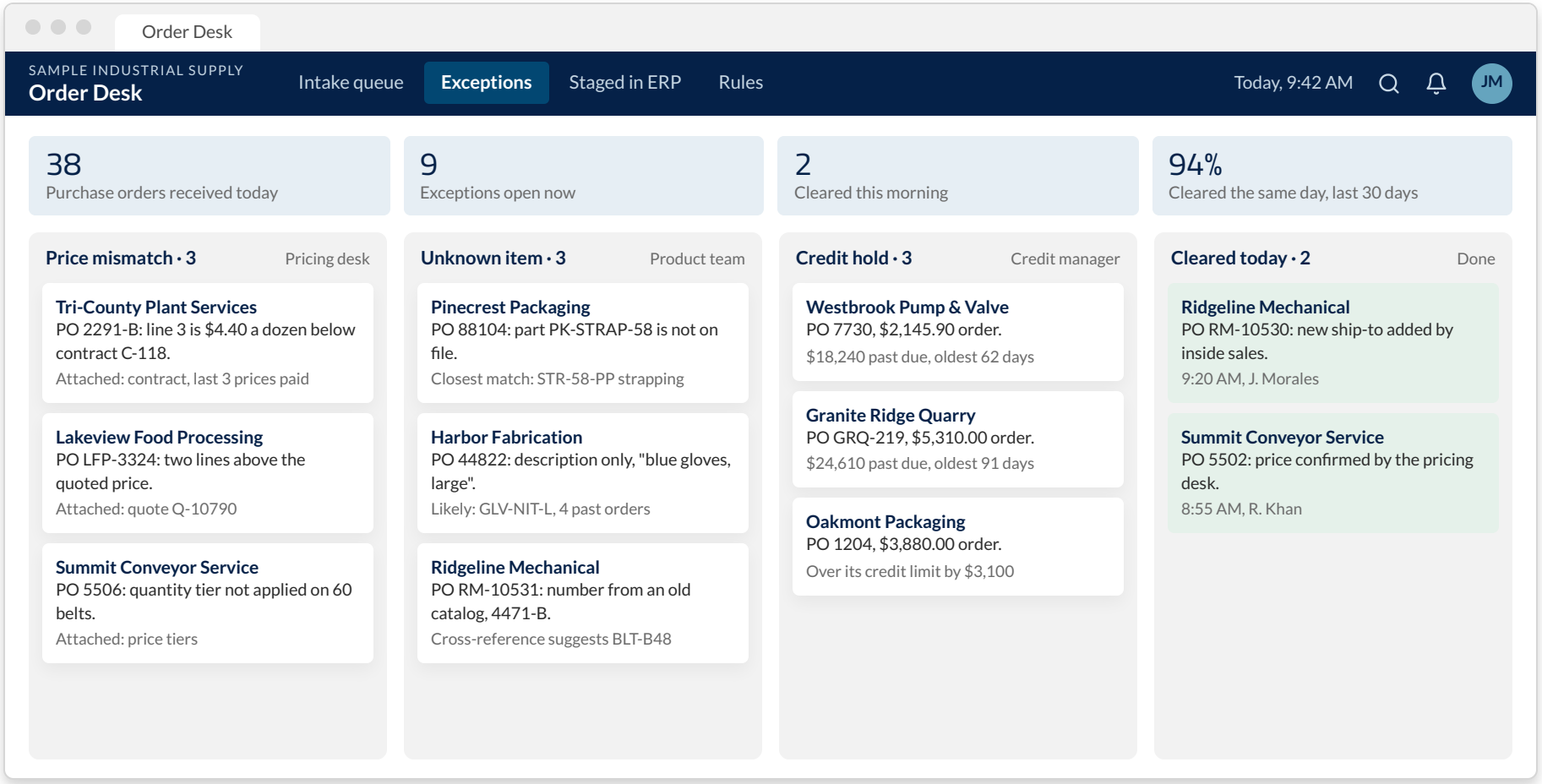
Nothing reaches the ERP until a person approves it. Price mismatches, unknown items, and credit holds go to the right person.

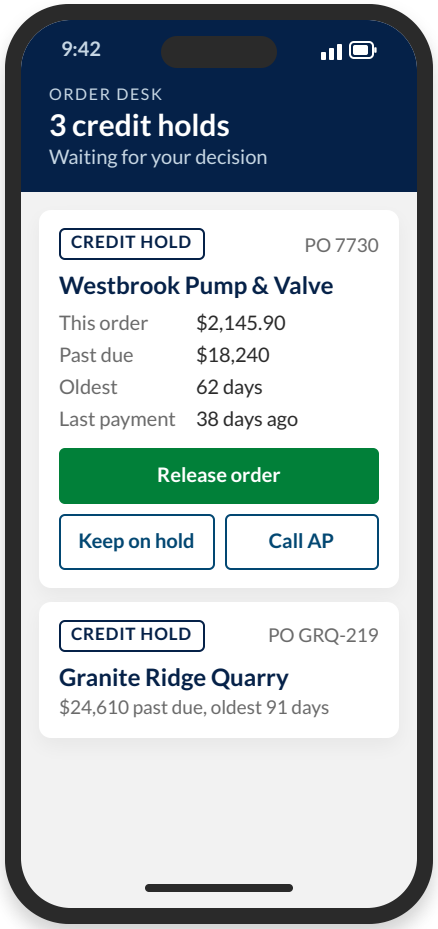
PROOF

PATTERN 03 Built on the Case 03 pattern: 30 to 38 hours a week returned to a contractor's team. We measure minutes per order and keying errors.

Order exceptions routed to the right person, with context

READY TO SCOPE SAMPLE DATA





WHAT IT DOES

Catches price mismatches, unknown items, and credit holds, and routes each to the right person with the context attached.

ON THE PHONE

The credit manager sees the hold, the balance, and the last payment, and decides from wherever they are.

PEOPLE STAY IN CHARGE

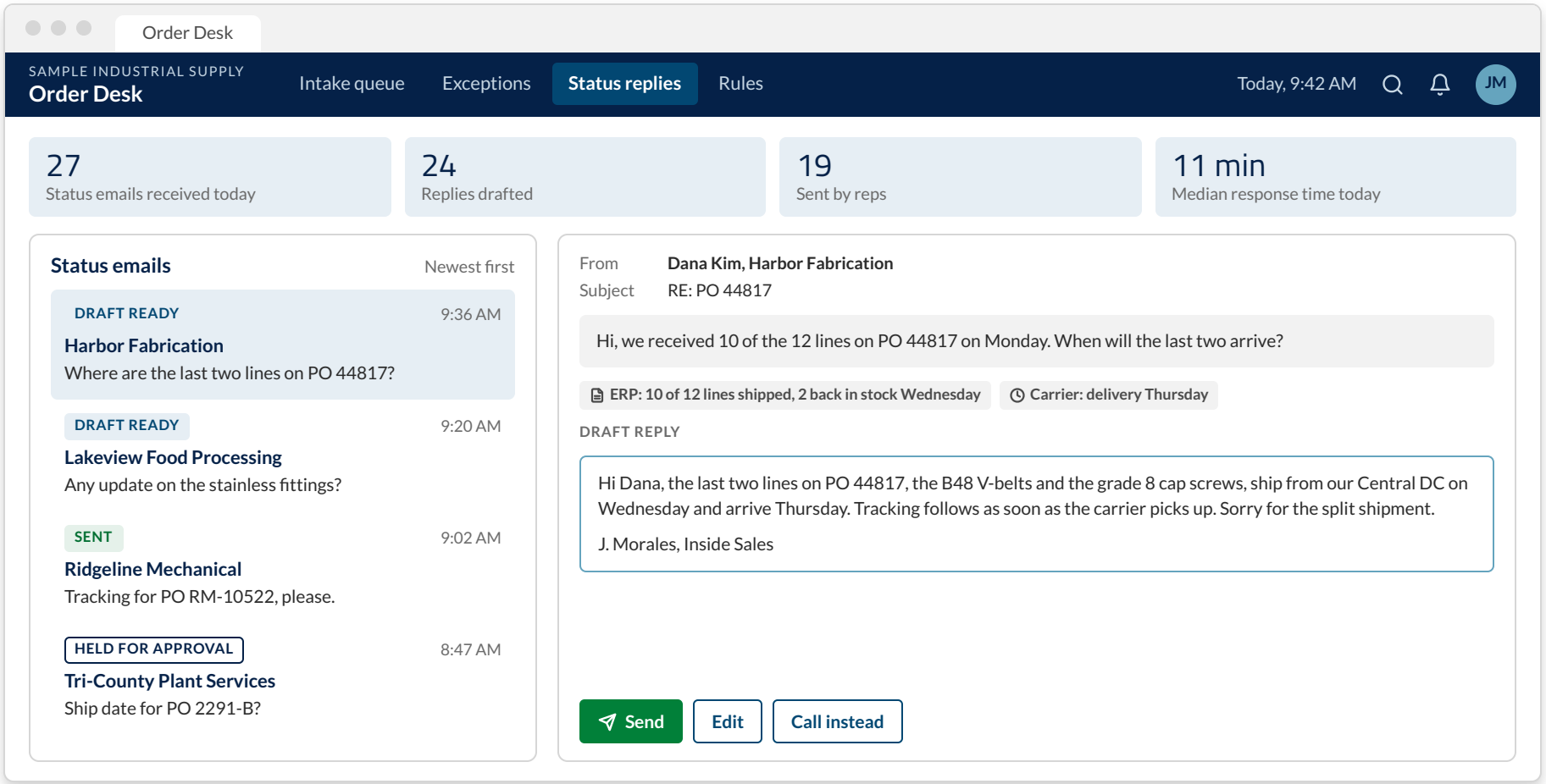
The agent sorts and routes; people decide. No order is released, repriced, or changed without its owner.

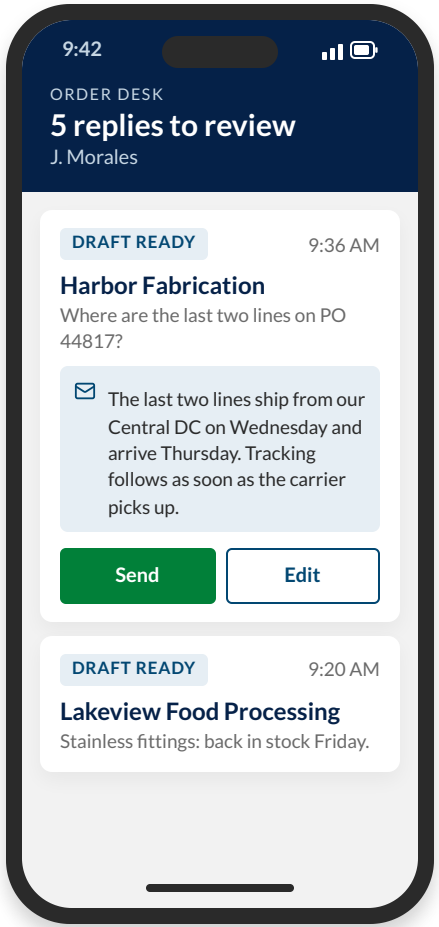
PROOF

READY TO SCOPE Shaped to your order rules and team in a first build. We measure exceptions cleared the same day.

Order status emails answered from the ERP and carrier

READY TO SCOPE SAMPLE DATA





WHAT IT DOES

Drafts answers to order status emails from ERP and carrier data, for a rep to review and send.

ON THE PHONE

A rep reviews each draft between calls and sends it with one tap, or edits it first.

PEOPLE STAY IN CHARGE

Every reply is a draft until a rep sends it. Nothing goes to a customer on its own.

PROOF

READY TO SCOPE Shaped to your ERP and carriers in a first build. We measure response time and status calls received.

Stock at every branch, today and six weeks out

READY TO SCOPE SAMPLE DATA

Stock Watch

SAMPLE INDUSTRIAL SUPPLY
Stock Watch

Flags | Branches | Open POs | Slow movers

Refreshed overnight from the ERP

All branches	Central DC	Lakeshore	Riverside	Northgate	Eastport
$11.1M	11.2 wks	7.9 wks	8.4 wks	14.6 wks	12.8 wks
On hand · 3.5 turns	4 short · 126 over	6 short · 58 over	5 short · 71 over	2 short · 104 over	6 short · 59 over

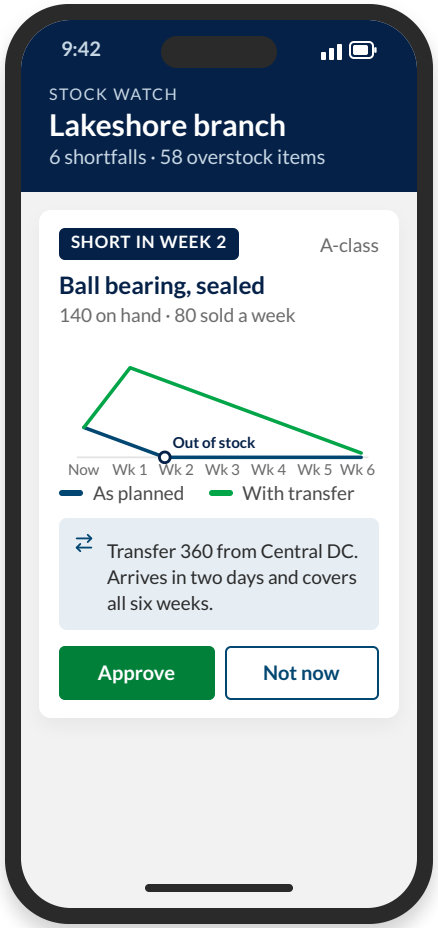
Flags for the next six weeks

23 shortfalls · 418 overstock items · shortfalls first

ITEM	BRANCH	ON HAND	OPEN POS	WEEKLY DEMAND	WEEKS OF COVER	FLAG	SUGGESTED ACTION
BRG-6205-2RS Ball bearing, sealed	Lakeshore	140	0	80	1.8	SHORT IN WEEK 2	Transfer 360 from Central DC
BLT-B48 Classic V-belt	Riverside	36	120, week 3	25	1.4	SHORT IN WEEK 2	Ask supplier to expedite PO 55120
GLV-A4-L Cut-resistant glove, dozen	Northgate	410	0	10	41.0	OVERSTOCK	Transfer 200 to Lakeshore
HCS-G8-0513-2 Hex cap screw, grade 8	Eastport	9,800	5,000	400	24.5	OVERSTOCK	Review open PO 55087
HYD-H08-2W Hydraulic hose, per ft	Central DC	620	1,000	150	4.1	ON TRACK	No action needed

Suggestions only. A buyer or branch manager approves every transfer, expedite, and reorder.

Export for buyers | Approve selected (1)



WHAT IT DOES

Sets stock at every branch against open purchase orders and demand, and flags shortfalls and overstock before they lose a sale or tie up cash.

ON THE PHONE

Branch managers see their own flags and the suggested fix, such as a transfer from the distribution center that arrives in two days.

PEOPLE STAY IN CHARGE

Transfers, expedites, and reorders are suggestions. A buyer or branch manager approves each one; nothing is ordered without a person.

PROOF

READY TO SCOPE Shaped to your ERP, branches, and buying rules in a first build. We measure stock-outs and inventory turns.

Velocity classes refreshed, with a plan for slow movers

READY TO SCOPE SAMPLE DATA

Stock Watch

SAMPLE INDUSTRIAL SUPPLY
Stock Watch

Flags | Branches | Open POs | **Slow movers**

Classes refreshed on the 1st of each month

1,840	2,760	13,820	$1.3M
A items, 80% of sales	B items	C items	Held in slow movers, at cost

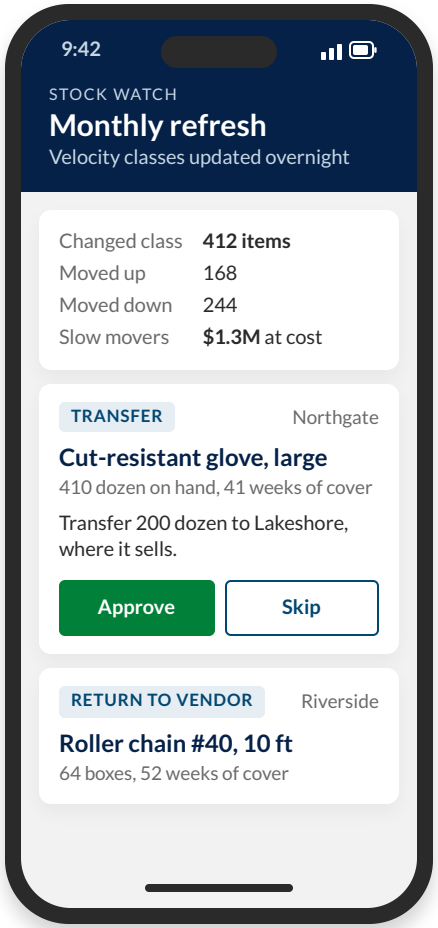
Slow movers, most cash first

412 items changed class this month

ITEM	BRANCH	ON HAND	WEEKS OF COVER	VALUE AT COST	CLASS	OPTION
FLT-HYD-10 Hydraulic filter	Central DC	880	**33.0**	$19,360	B to C	Transfer 300 to Riverside
GLV-A4-L Cut-resistant glove, dozen	Northgate	410	**41.0**	$16,400	B to C	Transfer 200 to Lakeshore
SAF-VEST-2XL Safety vest, 2XL	Eastport	300	**60.0**	$4,200	C	Promote to contractor accounts
CHN-40-10 Roller chain #40, 10 ft	Riverside	64	**52.0**	$3,520	C	Return to vendor
HCS-G8-0513-2 Hex cap screw, grade 8	Eastport	9,800	**24.5**	$2,744	A to B	Review open PO 55087

Options are suggestions. Buyers choose which transfers, returns, and promotions go ahead.

Export for buyers | Approve selected (1)



WHAT IT DOES

Refreshes ABC classes by SKU and branch on a schedule, and lists slow movers with options: transfer, return to vendor, or promote.

ON THE PHONE

The purchasing manager gets the monthly refresh: what changed class, and the cash held in slow movers.

PEOPLE STAY IN CHARGE

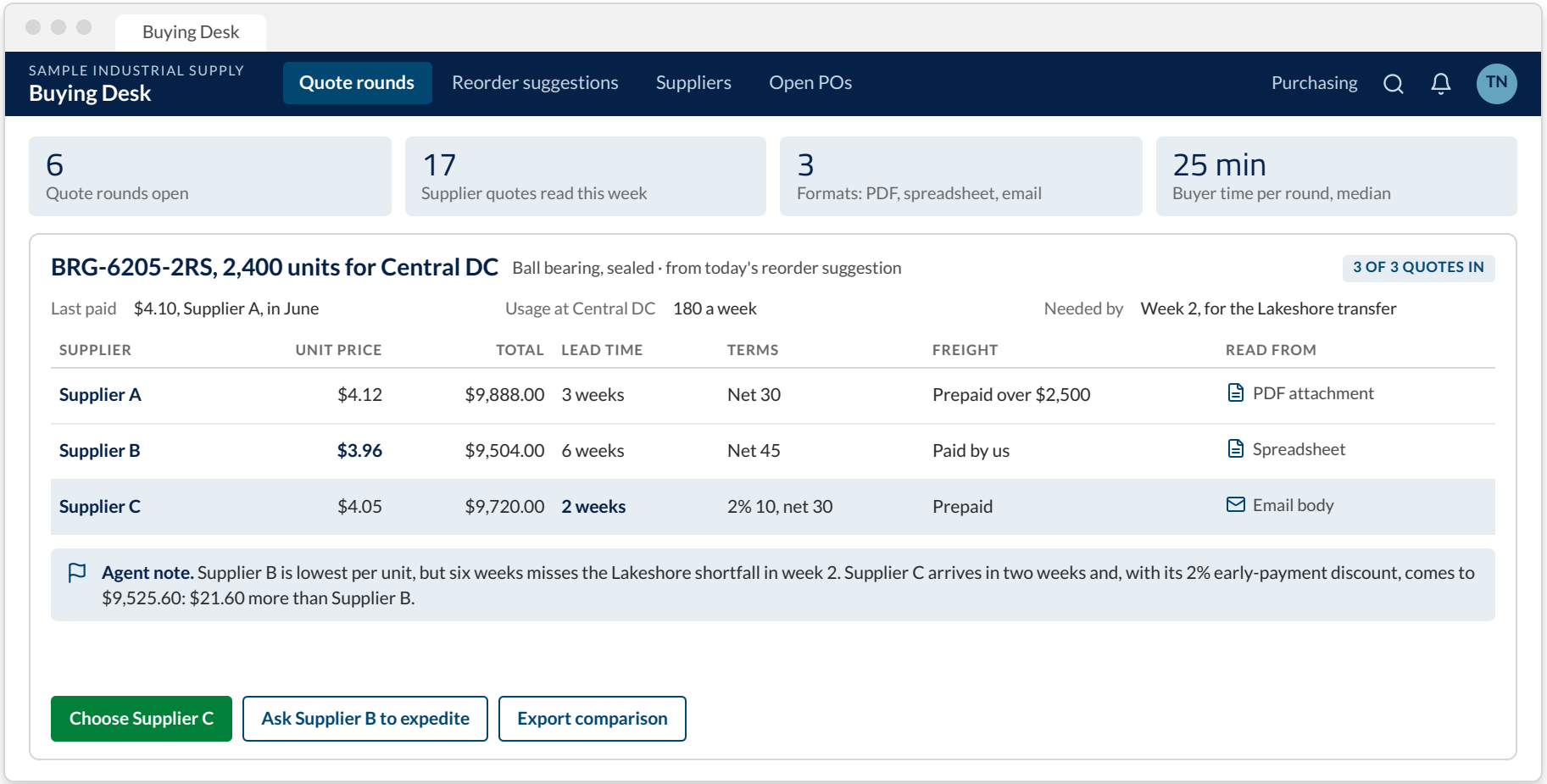
Options are suggestions. Buyers choose which transfers, returns, and promotions go ahead.

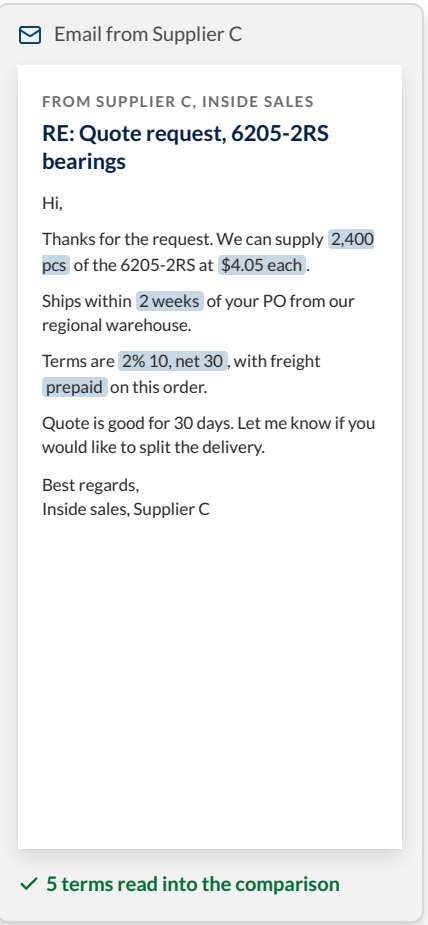
PROOF

READY TO SCOPE Shaped to your sales history and branches in a first build. We measure cash held in slow-moving stock.

Supplier quotes read from email and lined up side by side

READY TO SCOPE SAMPLE DATA





WHAT IT DOES

Reads quote attachments from email and lines up price, lead time, and terms side by side.

THE SOURCE DOCUMENT

Quotes arrive as PDFs, spreadsheets, or plain emails. Each figure shows where it was read from.

PEOPLE STAY IN CHARGE

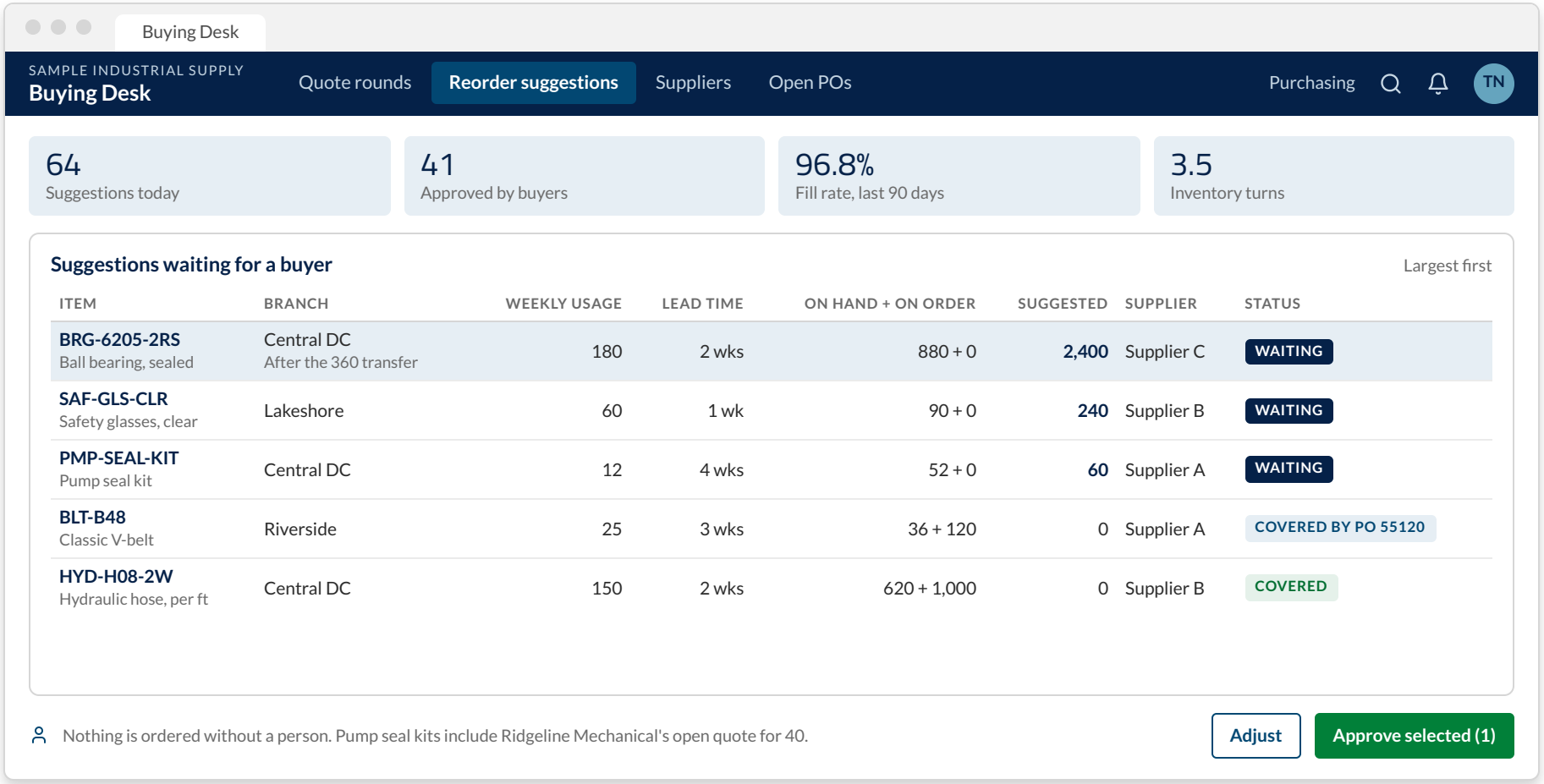
The buyer chooses the supplier and places the order. The comparison never orders on its own.

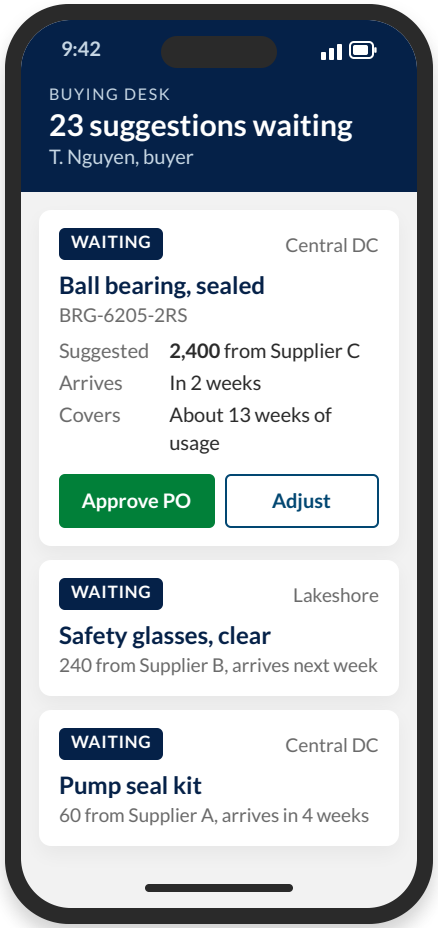
PROOF

READY TO SCOPE Shaped to your suppliers and buying rules in a first build. We measure buyer hours per quote round.

Reorder quantities proposed, and approved by a buyer

READY TO SCOPE SAMPLE DATA





WHAT IT DOES

Proposes reorder quantities from usage and lead times, for a buyer to approve.

ON THE PHONE

Buyers approve, adjust, or skip each suggestion from wherever they are.

PEOPLE STAY IN CHARGE

Nothing is ordered without a person. Every suggestion shows the usage and lead time behind it.

PROOF

READY TO SCOPE Shaped to your ERP, suppliers, and buying rules in a first build. We measure turns and fill rate.

Competitor prices tracked, with an alert on every move

CASE 02 SAMPLE DATA

Price Watch

SAMPLE INDUSTRIAL SUPPLY
Price Watch

Price moves | Items | Competitors | Alerts | Updated this morning | RK

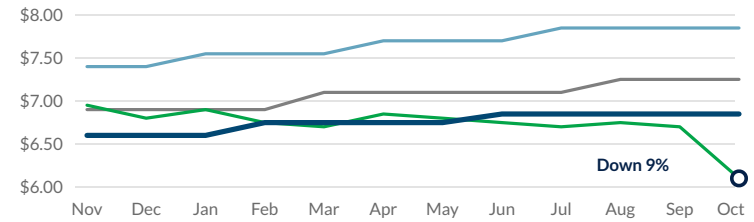
4,812	3,960	147	38
Items tracked	Matched to competitor listings (82%)	Competitor price moves this month	Items 10% or more above the market low

Price moves this week — Largest gap first

ITEM	YOUR PRICE	MARKET LOW	GAP	LATEST MOVE
BRG-6205-2RS Ball bearing, sealed	$6.85	$6.10	+12.3%	Competitor B, down 9%
HCS-G8-0513-2 Hex cap screw, grade 8	$0.42	$0.39	+7.7%	Competitor B, down 5%
WLD-70S6-035 MIG wire, 0.035 in, 33 lb	$96.50	$92.80	+4.0%	Competitor C, down 2%
BLT-B48 Classic V-belt	$14.20	$13.95	+1.8%	Competitor C, down 4%
HYD-H08-2W Hydraulic hose, 1/2 in, per ft	$4.15	$4.30	−3.5%	Competitor A, up 3%
GLV-A4-L Cut-resistant glove, large, dozen	$58.40	$61.75	−5.4%	Competitor A, up 6%

BRG-6205-2RS Ball bearing, sealed — A-CLASS ITEM

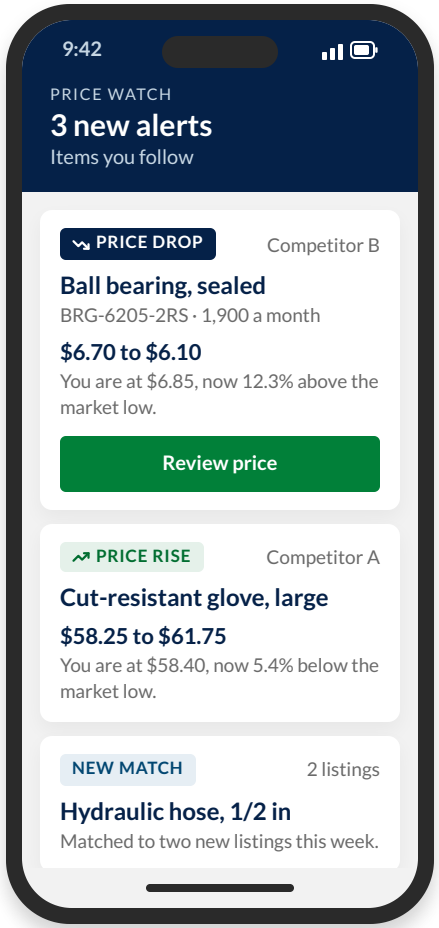
1,900 units a month · Matched to 3 competitor listings · Monthly price history



You **$6.85** · Competitor B **$6.10** · Competitor C **$7.25** · Competitor A **$7.85**

Alert sent this morning. Competitor B cut its price 9%, to $6.10. You are now 12.3% above the market low.

Review price | Compare listings | Mute item



WHAT IT DOES

Matches your items to competitor listings, keeps a monthly price history for each, and shows where every item sits against the market low.

ON THE PHONE

The pricing lead gets an alert when a competitor moves on an item that matters, with your price, the gap, and monthly volume.

PEOPLE STAY IN CHARGE

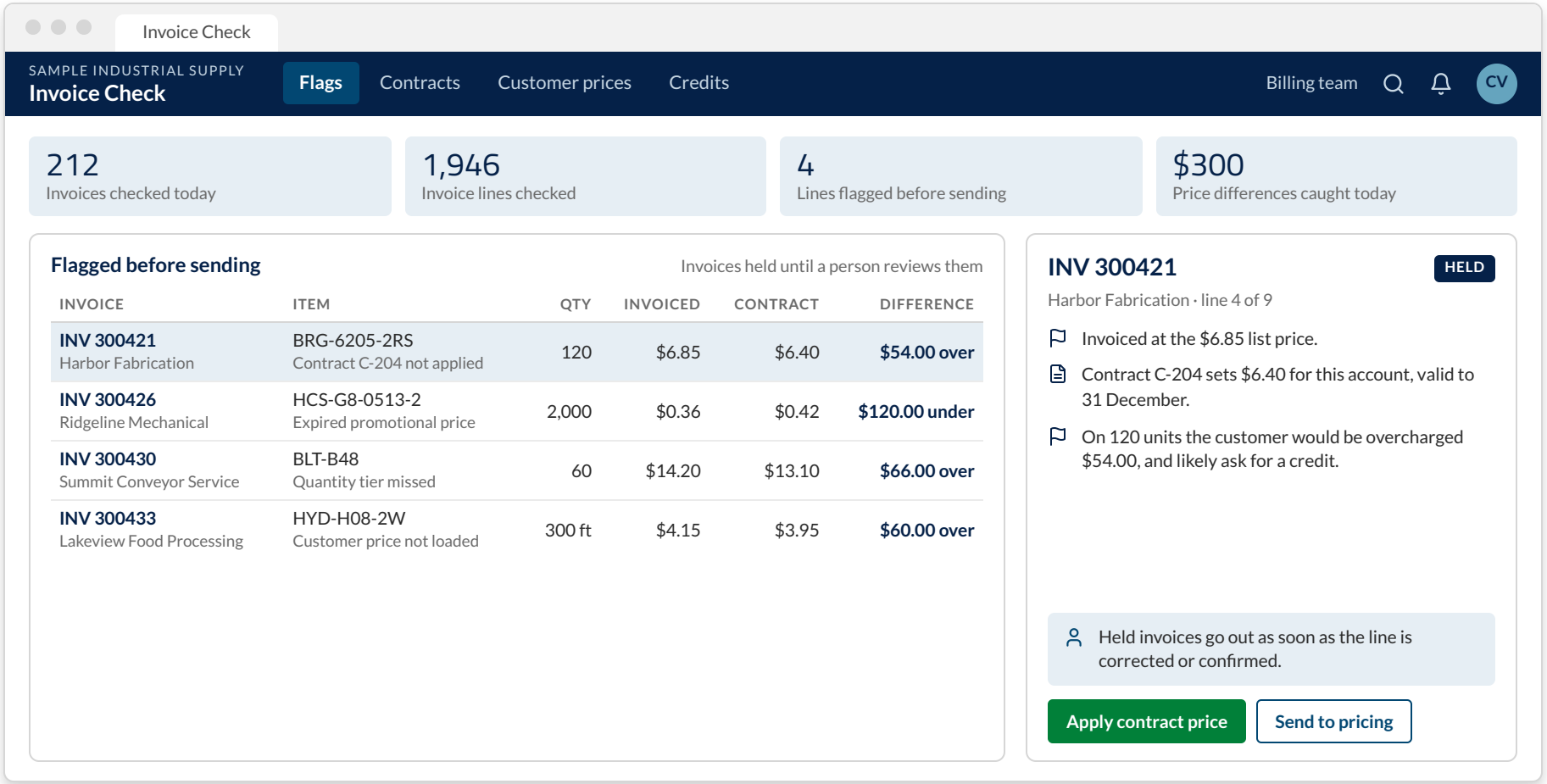
The tracker shows the market. Your team decides what to change, and every price change goes through your normal approval.

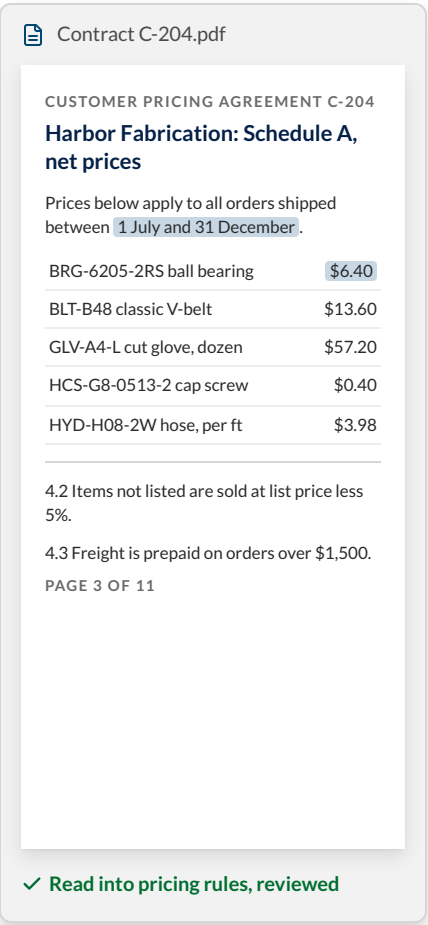
PROOF

CASE 02 A follow-on project for a recreational equipment manufacturer with 17,000+ SKUs. We measure items covered and margin by category.

Invoice prices checked against contracts before they go out

PATTERN 03 SAMPLE DATA





WHAT IT DOES

Compares invoiced prices to contract and customer-specific pricing, and flags leakage before invoices go out.

THE SOURCE DOCUMENT

Each flag points to the clause its price came from, in the customer's own agreement.

PEOPLE STAY IN CHARGE

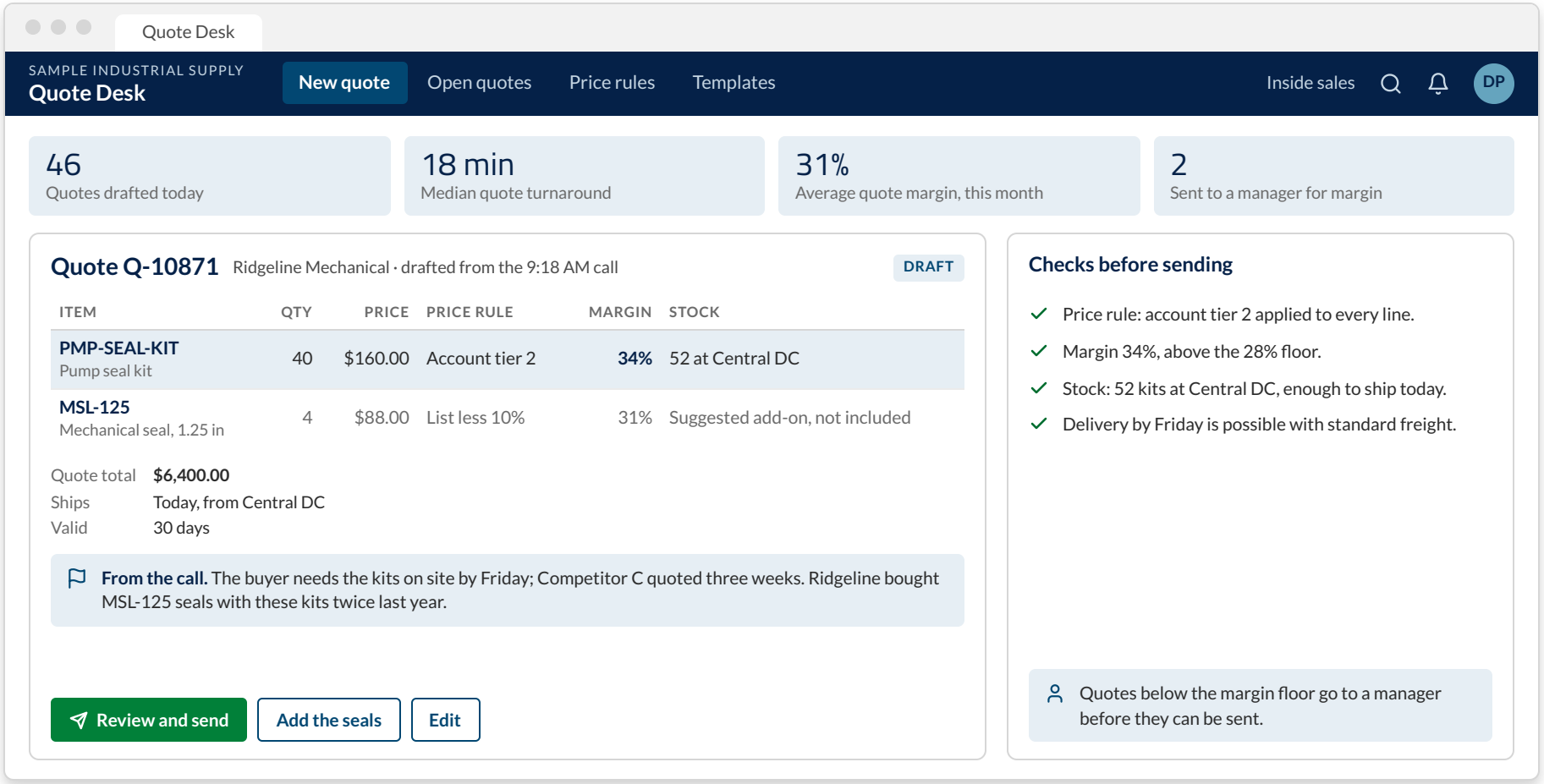
Billing staff approve every correction before an invoice is sent.

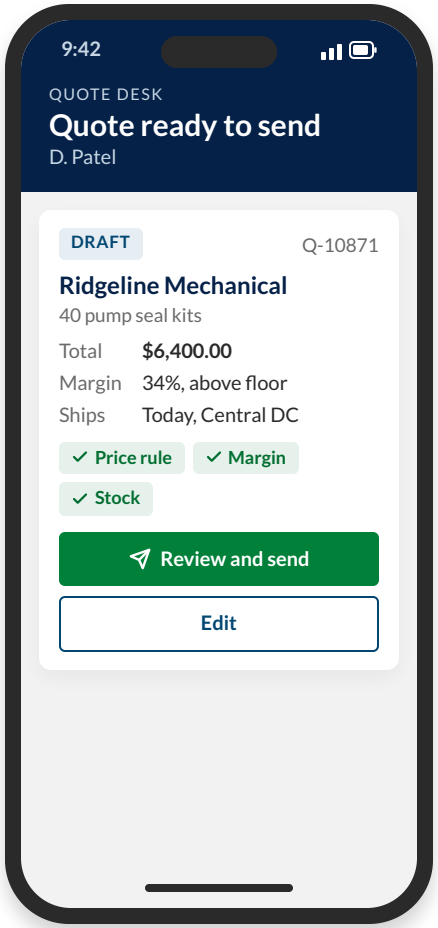
PROOF

PATTERN 03 Built on the Case 03 pattern: contract PDFs read into pricing rules. We measure pricing errors and credits issued.

Quotes built from price rules, margin floors, and stock

READY TO SCOPE SAMPLE DATA





WHAT IT DOES

Assembles quotes from price rules, margin floors, and stock position, for a rep to review and send.

ON THE PHONE

The rep reviews the draft minutes after the call and sends it from the phone.

PEOPLE STAY IN CHARGE

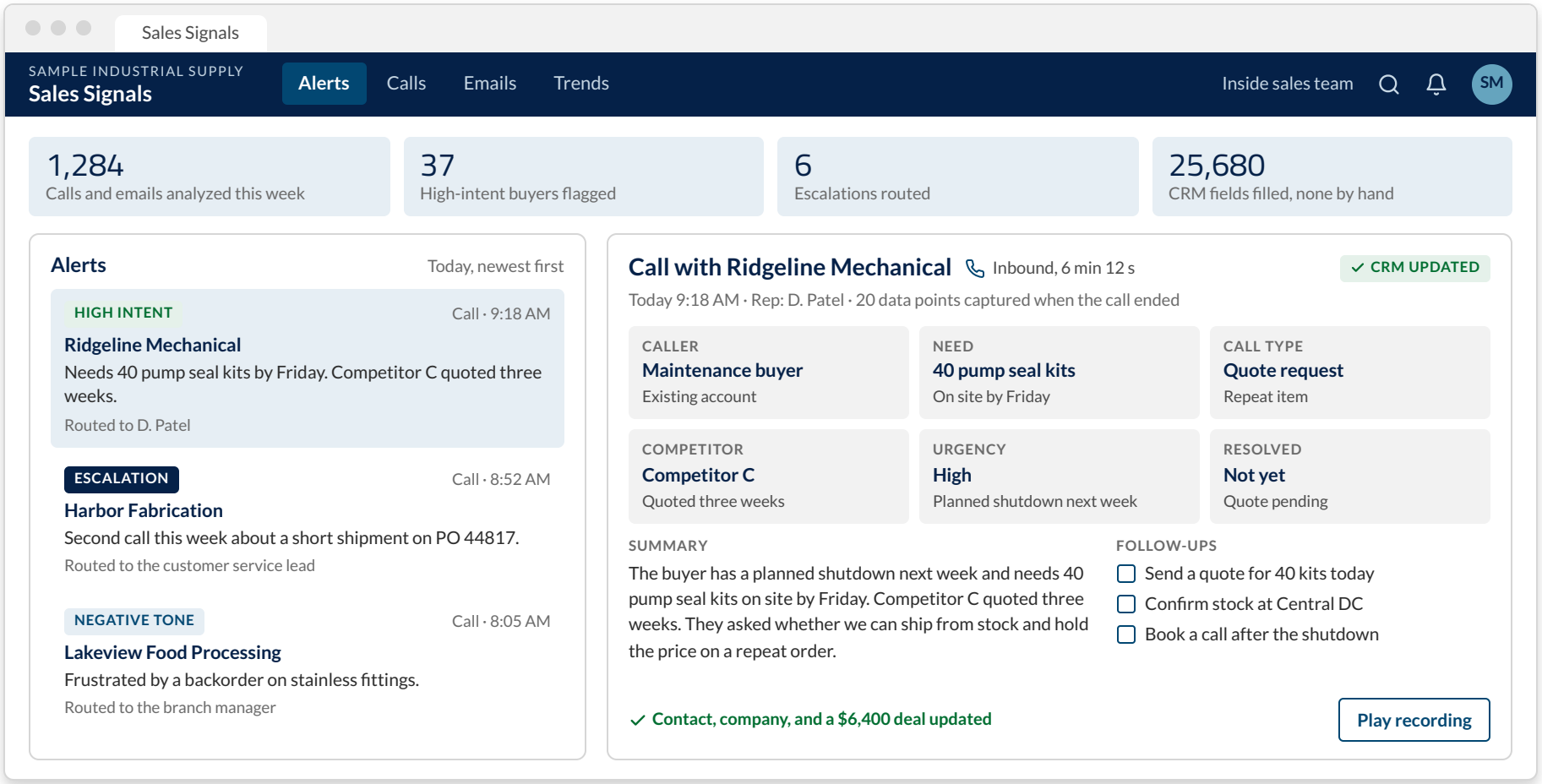
Every quote is a draft until a rep sends it. Anything below the margin floor goes to a manager first.

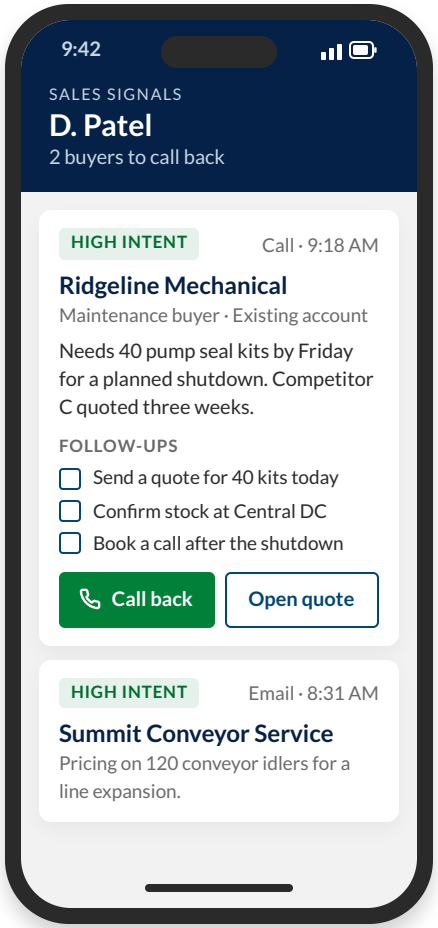
PROOF

READY TO SCOPE Shaped to your price rules and margin floors in a first build. We measure quote turnaround and quote margin.

Every sales call and email turned into CRM data

CASE 02 SAMPLE DATA





WHAT IT DOES

Reads every call and email when it ends: who called, what they need, competitors named, urgency, and follow-ups. The CRM fills itself in.

ON THE PHONE

The rep sees the high-intent buyer, a short summary, and the follow-ups before calling back, wherever they are.

PEOPLE STAY IN CHARGE

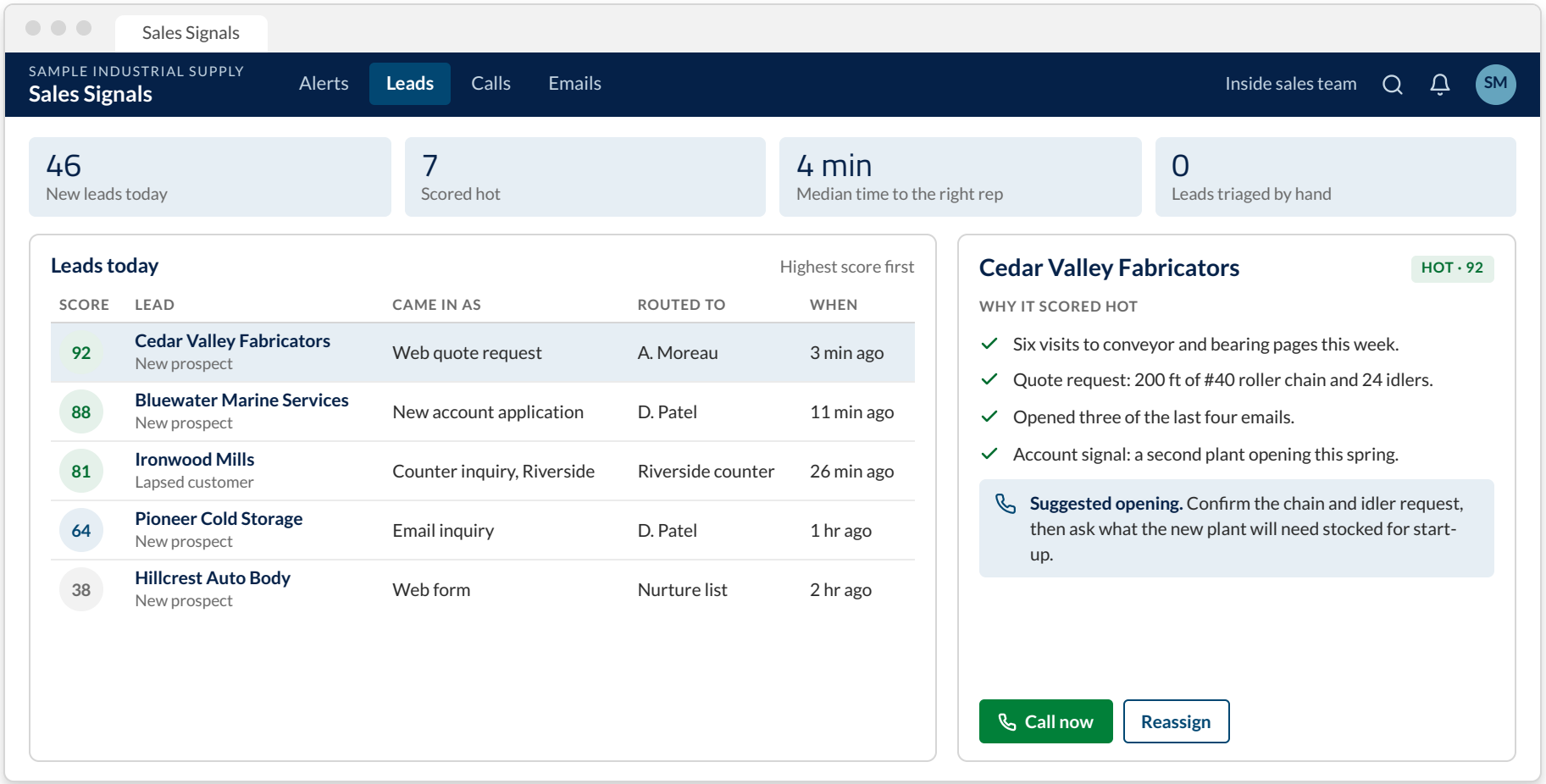
Reps decide what to say and what to send. The agent handles the data entry and the triage, so the team spends the day selling.

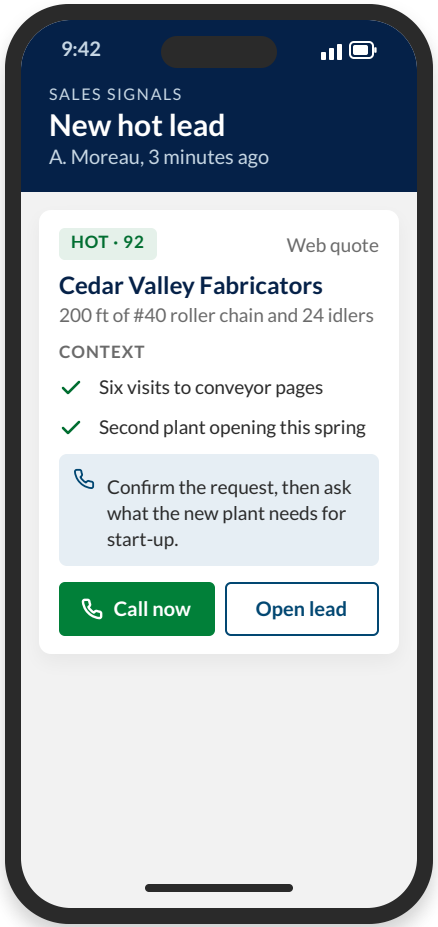
PROOF

CASE 02 Delivered for a recreational equipment manufacturer: 20 data points from every call, 5,000+ past calls processed, zero manual tagging.

Hot leads scored and routed to the right rep in minutes

CASE 05 SAMPLE DATA





WHAT IT DOES

Scores web quote requests, counter inquiries, and new account applications, and sends the hot ones to the right rep with context.

ON THE PHONE

The rep gets each hot lead in minutes, with what the buyer looked at and a suggested opening.

PEOPLE STAY IN CHARGE

The agent does the triage; reps spend the day selling, and decide how to work each lead.

PROOF

CASE 05 Delivered for a commercial cleaning franchise: hot leads reach the right rep in minutes, with zero manual triage.

Quiet quotes surfaced, with a follow-up ready to send

READY TO SCOPE SAMPLE DATA

Quote Desk

SAMPLE INDUSTRIAL SUPPLY
Quote Desk

New quote | Open quotes | Price rules | Templates

Inside sales DP

128	19	11	27%
Open quotes	Quiet for 7 days or more	Follow-ups drafted today	Quote conversion, last 90 days

Going quiet Largest first

QUOTE	VALUE	SENT	SIGNAL
Q-10777 Tri-County Plant Services	$7,412.00	15 days ago	Buyer away until Monday
Q-10812 Pinecrest Packaging	$4,860.00	9 days ago	Opened twice, no reply
Q-10790 Lakeview Food Processing	$3,215.50	12 days ago	Asked about lead time
Q-10804 Harbor Fabrication	$2,940.00	8 days ago	HELD: OPEN SHIPPING ISSUE

To **Sam Ortiz, Pinecrest Packaging**
Subject Your quote Q-10812

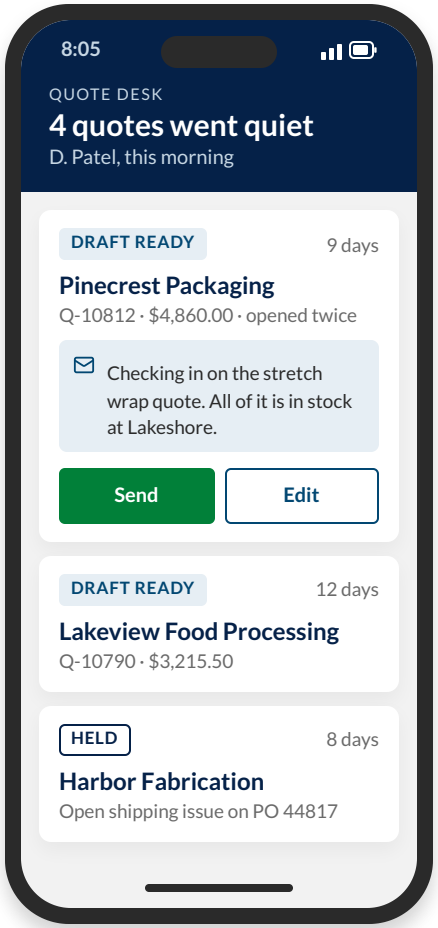
DRAFT FOLLOW-UP

Hi Sam, checking in on the quote for stretch wrap and poly strapping we sent last week. Everything on it is in stock at Lakeshore, and the pricing holds through the end of the month.

Would it help to split the order into two deliveries?

D. Patel, Inside Sales

Send | Edit | Snooze a week



WHAT IT DOES

Surfaces quotes going stale and drafts follow-ups for the rep to send.

ON THE PHONE

Each morning the rep sees which quotes went quiet, with a short follow-up ready to edit or send.

PEOPLE STAY IN CHARGE

Follow-ups are drafts; the rep decides what to send and when. Quotes with an open service issue are held.

PROOF

READY TO SCOPE Shaped to your quoting system and CRM in a first build. We measure quote conversion rate.

A page for every branch, written for its own market

CASE 06 SAMPLE DATA

Location Pages

SAMPLE INDUSTRIAL SUPPLY
Location Pages

Branches | Drafts | Published | Search | Marketing | EL

5 of 5	40	3,420	1
Branch pages live	Local product and service pages	Local search visits this month	Update waiting for approval

Branch pages — Each one written for its own market

BRANCH	LOCAL FOCUS	STATUS
Central DC /branches/central-dc	Will-call counter, same-day delivery	LIVE
Lakeshore /branches/lakeshore	Food processing and packaging plants	UPDATE DRAFTED
Riverside /branches/riverside	Quarries and aggregates	LIVE
Northgate /branches/northgate	Machine shops and fabrication	LIVE
Eastport /branches/eastport	Port, marine, and cold storage	LIVE

Lakeshore: update drafted WAITING

Sample Industrial Supply — Lakeshore

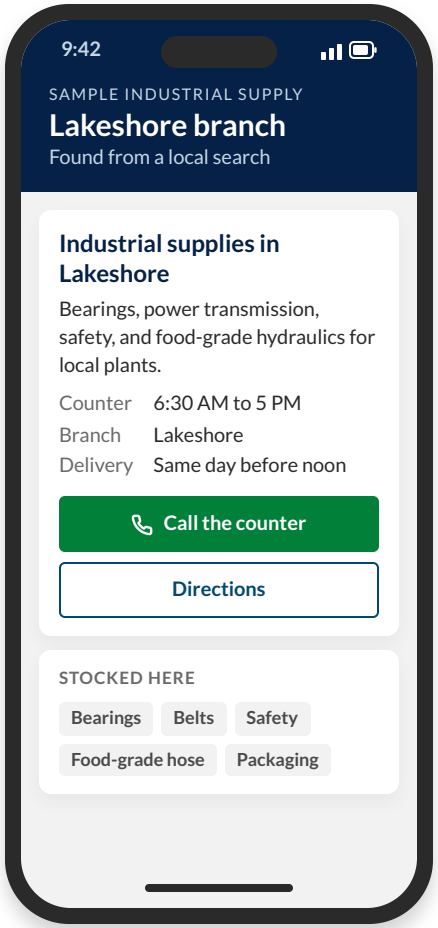
Industrial supplies in Lakeshore

Bearings, power transmission, safety, and food-grade hydraulics for the plants along the lakeshore, from a counter that knows them.

WHAT CHANGED

- ✓ New counter hours, open from 6:30 AM.
- ✓ Food-grade hose line added to the local product list.
- ✓ Checked against local competitor pages and search terms.

Approve and publish | Edit



WHAT IT DOES

Writes and maintains a unique page for every branch, with its local product lines, services, and contacts.

ON THE PHONE

A buyer searching nearby finds the branch page: what it stocks, its counter hours, and who to call.

PEOPLE STAY IN CHARGE

Marketing approves each page before it publishes, and again whenever it changes.

PROOF

CASE 06 Delivered for a waste management franchisor: 1,000 unique pages for 125 locations in 16 business days.

The ERP and the billing platform bridged, with no re-keying

CASE 04 SAMPLE DATA

Billing Bridge

SAMPLE INDUSTRIAL SUPPLY
Billing Bridge

This cycle | Mapping rules | History | Settings | Accounting | CV

1 **Export loaded**
1,184 lines from the ERP

2 **Mapped**
With your contract and pricing rules

3 **Checked**
6 lines flagged before invoicing

4 **Ready**
206 clean invoices for billing

Flagged before invoicing

6 lines on 6 invoices

LINE	CUSTOMER	ISSUE	SUGGESTED FIX
0412	**Harbor Fabrication**	Ship-to missing in the billing platform	Copy ship-to from the ERP
0587	**Lakeview Food Processing**	Tax code differs between systems	Use the exemption on file
0733	**Summit Conveyor Service**	Freight line has no billing code	Map to outbound freight
0861	**Ridgeline Mechanical**	Customer number not mapped	Match to billing account
0950	**Tri-County Plant Services**	Unit is dozen in one system, each in the other	Bill per dozen, as contracted
1102	**Pinecrest Packaging**	Same line exported twice	Remove the duplicate

Field mapping

ERP to billing

CUST_NO	Account ID	✓
SHIP_TO	Service location	✓
EXT_PRICE	Line amount	✓
TAX_CD	Tax rule	✓
UOM	Billing unit	✓

Flagged lines wait for a person. Only clean invoices go to the billing platform.

Send 206 invoices | Review flags

erp_invoice_export.csv

LOADED ONCE, AT THE START OF THE CYCLE

ERP invoice export

LINE	CUST_NO	SKU	QTY
0409	10318	BRG-6205	120
0410	10318	BLT-B48	10
0411	10318	HCS-G8	200
0412	10318	GLV-A4-L	12
0413	10442	BRG-6205	24
0414	10442	BLT-B48	10
0415	10442	GLV-A4-L	12
0416	10442	HCS-G8	200
0417	20417	HYD-H08	250
0418	20417	WLD-70S6	4
0419	20511	PMP-SEAL	6
0420	20511	BRG-6205	48

1,184 lines in this export.

✓ One upload, no re-keying

WHAT IT DOES

Moves billing data between systems that do not talk, maps it with your own rules, and checks it before anything is invoiced.

THE SOURCE DOCUMENT

Staff load one export from the ERP. No one re-keys a line into the billing platform.

PEOPLE STAY IN CHARGE

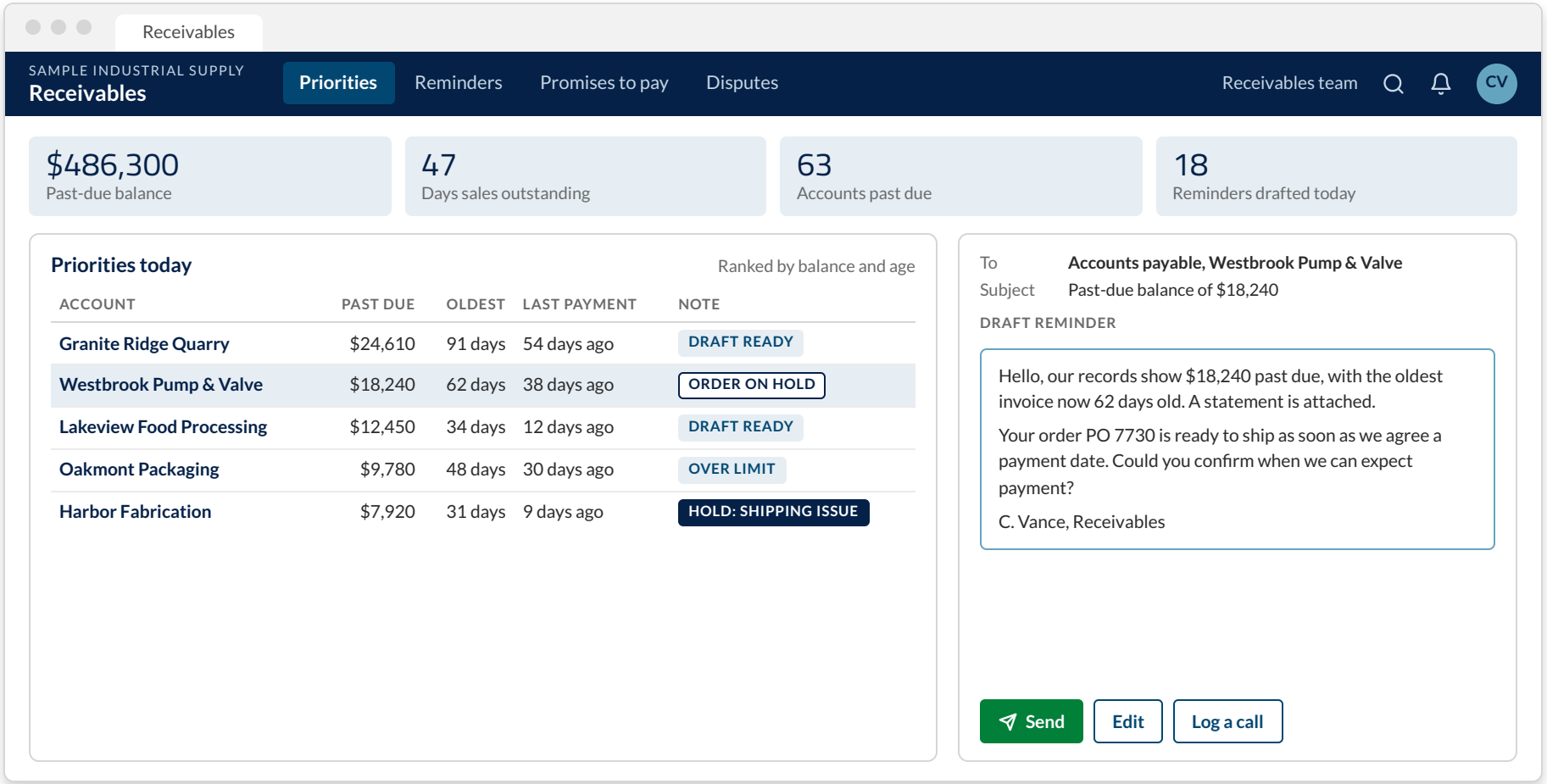
Flagged lines wait for a person. Only clean invoices reach the billing platform.

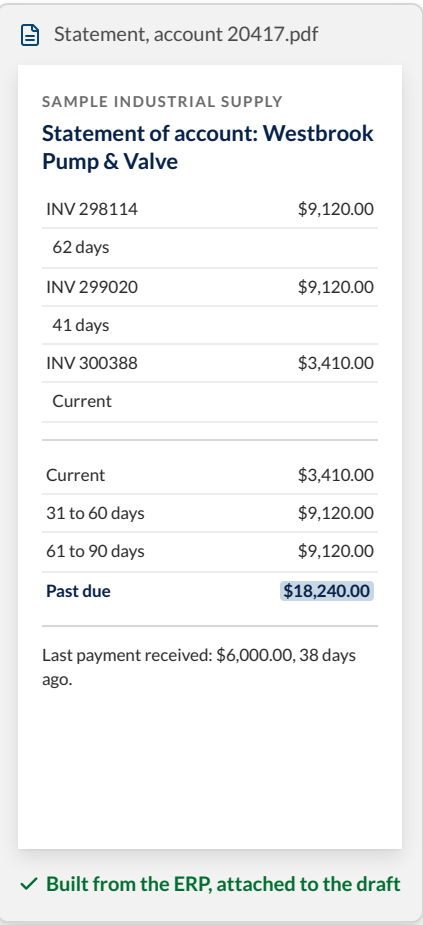
PROOF

CASE 04 Delivered for a commercial cleaning franchise: a two-week billing cycle cut to about two hours.

Past-due accounts ranked, with reminders drafted to send

READY TO SCOPE SAMPLE DATA





✓ Built from the ERP, attached to the draft

WHAT IT DOES

Ranks past-due accounts by balance and age, and drafts reminders for receivables staff to send.

THE SOURCE DOCUMENT

Each reminder carries a statement built from the ERP, so the customer sees the same numbers you do.

PEOPLE STAY IN CHARGE

Staff send every reminder. Accounts with an open service issue are flagged, so no one chases them by mistake.

PROOF

READY TO SCOPE Shaped to your ERP and collection rules in a first build. We measure days sales outstanding and past-due balance.

Rebates matched to sales, with every claim prepared

READY TO SCOPE SAMPLE DATA

Rebate Desk

SAMPLE INDUSTRIAL SUPPLY
Rebate Desk

Programs | Claims | Special pricing | Manufacturers | Finance | CV

14	$38,920	$31,460	$7,460
Programs tracked	Rebates earned in Q3	Claimed so far	Ready to claim

Programs with money waiting

Q3 sales matched to program terms

PROGRAM	TYPE	QUALIFYING SALES	EARNED	CLAIMED	STATUS
Cut-resistant glove growth Manufacturer A	Volume rebate, 5%	$96,200	$4,810	$0	CLAIM PREPARED
Bearing special pricing Manufacturer B	Ship and debit, $2.50 a unit	1,060 units	$2,650	$0	CLAIM PREPARED
Hydraulic hose program Manufacturer C	Volume rebate, 3%	$61,400	$1,842	$1,842	CLAIMED
Welding wire tiers Manufacturer D	Tier rebate	$231,400	Tier 1	Paid yearly	$18,600 TO TIER 2

Agent note. Two claims are prepared in each manufacturer's format, with the matched invoices attached: $7,460 in total. Each one waits for your approval.

Review claims (2) | Export Q3 detail

Claim, Manufacturer A.pdf

PREPARED, NOT YET SUBMITTED

Growth rebate claim

Distributor	Sample Industrial Supply
Program	Cut-resistant glove growth
Period	Q3
Qualifying sales	$96,200.00
Rebate rate	5%
Claim amount	**$4,810.00**

Supporting detail: 214 invoices, matched by item and ship date, attached.

Signed: _____

✓ In the manufacturer's own format

WHAT IT DOES

Matches sales to manufacturer rebate and special-pricing programs, and prepares the claims.

THE SOURCE DOCUMENT

Each claim arrives prepared in the manufacturer's format, with the matched invoices behind it.

PEOPLE STAY IN CHARGE

A person approves and signs every claim before it goes to a manufacturer.

PROOF

READY TO SCOPE Shaped to your programs and manufacturers in a first build. We measure rebates claimed against rebates earned.

HOW IT STARTS

Every screen starts as one narrow build

From a first conversation to a first screen

1

A first conversation about money and time

Where the largest spend sits, which task repeats every week, and which process lives in one person's head.

2

A first build on one process

A narrow first project on the process with the clearest payback. Your team checks the results against the way they do it today before anything goes live.

3

A roadmap and a dedicated engineer

Once the first build proves out, an engineer works through a prioritized list. Each screen adds to the last.

Start with the screen that would matter most

A first conversation is a discussion between peers. It ends with one or two processes worth a closer look and what each is worth.

Mahesh Swami

Managing Director, WSI Swami Group

28 years at 3M, including directing its global distribution model for B2B industrial products.

mahesh.swami@wsiworld.com

+1 416 238 6786

www.wsiworld.com/mahesh-swami

Your systems stay

We connect to your ERP, CRM, and email rather than asking you to replace them.

People stay in charge

AI drafts, checks, and stages the work. Your team approves anything that commits money or goes to a customer or supplier.

You own what we build

The workflows, data, and tools built for your business belong to your business.

Works on any AI platform

Builds work across Microsoft Copilot, ChatGPT, and Claude, so a change of platform never strands the work.

Every screen in this document shows sample data. Company names, part numbers, prices, and figures are illustrative and describe no client. Proof labels match the companion case studies, AI that pays back in distribution: a Case is delivered work, a Pattern is built on a delivered pattern, and Ready to scope is shaped to your systems in a first build.