

eBook

Meeting the Moment:

Opportunities and Challenges
for Wholesale and Distribution
in the Micro-Fulfillment Boom



Customer Demands Are Changing — Wholesale and Distribution Must Change Too

The e-commerce expectation has hit wholesale and distribution. Gartner predicts that 80% of B2B sales interactions will occur in digital channels by 2025^[1]. The B2B e-commerce industry is expected to surpass USD 4.6 billion in the next two years^[2]. Is the sector ready to meet the moment?

As the micro-fulfillment trend explodes through retail and other industries, wholesale and distribution businesses are turning towards evolving distribution strategies. More and more, customers are seeking collaborative solutions and targeted experiences with their wholesale and distribution partners. Shorter delivery times, better delivery options, and omni-channel ordering options are the new benchmarks. Increasing competition in the wholesale distribution sector is driving the development of new revenue sources, while socio-political instability on the global stage drives a more urgent need for supply chain flexibility and resilience.

Under this avalanche of new pressures, the wholesale distribution industry is changing fast. To remain competitive, wholesalers and distributors are looking for ways to bring their inventory closer to customers, mitigate ballooning last-mile costs, and deliver an omni-channel B2B e-commerce-like experience in response to changing customer demands. Agility, flexibility, and customer experience are the name of the game, but legacy transport management system (TMS), warehouse management system (WMS), warehouse execution system (WES) and order management system (OMS) solutions are not designed to deliver the new wholesale distribution promise. Without sufficient digital maturity to support these strategies, many wholesalers and distributors are falling behind.

A brief history of digital transformation in the supply chain

**2017–
2022**

Retail rushes to meet customer demand / pandemic e-commerce boom. Rolls out omni-channel commerce strategies from sales side. Fulfillment and distribution lags behind.

**2022–
2023**

Retail looks to internal supply chain stakeholders and order fulfillment to follow through on sales promises. Micro-fulfillment strategies begin to roll out. Customers acclimatize to unprecedented delivery speeds and effortless omni-channel e-commerce experience.

**2023–
beyond**

B2B customers increasingly expect an e-commerce experience from wholesalers and distributors. Risks to wholesale distribution are myriad — Merger & Acquisition (M&A), disintermediation and better competitor offerings are a constant threat.

- Digital distribution emerges as an effective strategy for managing the new demands of B2B customers.
- Digital maturity that supports more agile, flexible and faster distribution practices emerges as a requirement for competitiveness in wholesale and distribution.

What Is Digital Distribution?

Wholesale and distribution customers are increasingly expecting an e-commerce experience in their B2B supplier relationships, characterized by omni-channel ordering options, personalized services, better customer experience (CX), value-add services and faster fulfillment times.

In response, wholesalers and distributors are expanding digital distribution approaches to deliver an optimized omni-channel experience at every touchpoint. By implementing digital pivots to transform operations, wholesalers and distributors are leveraging automation, artificial

intelligence (AI), machine learning (ML), and other digital solutions to streamline processes and increase efficiencies across the board.

The digital distribution trend presents a major opportunity for wholesale and distribution, but it also presents a unique set of challenges. To support the additional complexity that the pursuit of a digital distribution strategy entails, wholesalers and distributors must increase their level of digital maturity, particularly around fulfillment and inventory management processes.



What's the Opportunity for Wholesale & Distribution?

Supported by the correct level of digital maturity, a move toward digital distribution presents a host of new opportunities for wholesalers and distributors to maximize operational efficiencies and perfect omni-channel execution. Digital distribution allows wholesalers and distributors to expand their customer base, boost margins, increase competitiveness, and deliver an exceptional customer service experience to future-proof their operations.



Compete on customer experience

Digital distribution allows wholesalers and distributors to offer a drastically elevated customer experience as a primary differentiator. By streamlining every aspect of the operation, wholesalers and distributors can deliver a seamless, friction-free customer experience that not only meets but exceeds new customer expectations.



Perfect omni-channel execution

With the requisite levels of digital and infrastructural fidelity, wholesalers and distributors can serve and execute across multiple channels, no matter where the order originates, providing full end-to-end visibility from warehouse, to yard, to road and beyond. A fully connected operation is able to handle the increased levels of complexity omni-channel execution requires, optimizing service delivery and operational efficiencies throughout the order lifecycle.



Speed and agility

With digital distribution, wholesalers and distributors can achieve unprecedented speed and agility. No matter the complexity of the customer request, a good digital distribution architecture allows for a quick and efficient response, adept problem solving and customized solutions.



Bring inventory closer to the customer

Digital distribution helps companies bring inventory closer to the customer and the customer's customers, expediting fulfillment times and helping meet customer expectations.



Develop value-added services

This strategy can support a range of value-added services like direct delivery, pick and pack, kitting, pre-assembly and more. Wholesalers and distributors can leverage existing resources to add major value for the customer, improving on CX and customer service at every touchpoint.



Scale without intensive capital investment

Achieving digital maturity allows wholesalers and distributors to scale without intensive capital investment. Growth no longer comes at the expense of margin, and vice versa.

Why Digital Distribution, and Why Now?

Omni-channel is the new standard

Research by McKinsey indicates that today's B2B buyers are using up to 10 channels to conclude the buying process, from self-service portals to video and phone calls[3]. Customers want an even mix of traditional, self-service, and in-person sales channels[4]. Omni-channel selling capabilities are no longer a nice-to-have for wholesale and distribution — they are the new standard.

Customer-centricity is the key to unlocking revenue growth

With third-party marketplaces, disintermediation, and M&A activity eating into the wholesale distribution market share, customer-centricity is emerging as a top survival strategy. Research shows that B2B organizations with a strong customer-centric culture experience 2.5 times more revenue growth compared with the average[5]. Furthermore, Forbes reports that over half of customers are prepared to pay more for a better customer experience [6]. Digital distribution improves customer experience at every level, delivering increased speed, accuracy, responsiveness, and flexibility for collaborative solutioning and more personalized customer experiences.

E-commerce is the way forward for wholesale distribution

Gartner predicts that 80% of B2B sales interactions will occur in digital channels by 2025 [1]. The B2B e-commerce industry is expected to surpass USD 4.6 billion in the next two years [2]. According to McKinsey, one in five B2B purchasers are prepared to spend over \$500,000 online[3]. The e-commerce expectation, including absolute convenience, faster delivery times, seamless mobile ordering experiences and frictionless buying, has come to wholesale and distribution. However, legacy systems are not equipped to manage the additional complexity required to meet these changing customer demands.



With the upcoming convergence of omni-channel strategy and AI breakthroughs, there will be a new wave of use cases and a need for solutions that can adapt to a highly dynamic marketplace. Best-of-breed solutions will not be measured by the breadth and depth of features but rather the ability to manage disruptions while remaining technically and functionally resilient.



Rizwan Butt

Senior Director, Product Management, Blue Yonder



If we learned anything over the last few years, consumers want their products at a competitive price, as quickly as possible, and via the channel of their choice. Supply chains have been in an accelerated transformation to meet those needs. Competition for customers has never been greater. With the supply chain disruptions over the last few years, customers are experienced in making the pivot to find the product or materials they need. Supply chain executives who can maximize digital distribution will gain a competitive edge.



Terence Leung

Senior Director, Product Marketing, Blue Yonder

Case Study:

Fortune 500 Industrial Distributor Transforms Paper-Cased DCs Into Flexible Digital Operations With AFW

A Fortune 500 industrial distributor purchased Blue Yonder's WMS solution to manage their large, complex DC. Their operations include over 400 sites of varying size, complexity, and operational diversity. When they signed the initial contract, AFW was still in development, so the original plan was for Blue Yonder's WMS to be deployed at all sites, including their smaller DCs and stores.

A few years later, the same industrial distribution customer became aware of Blue Yonder's AFW, and inquired if it could be used in their 350 branch locations to solve a very specific parcel pack station need, since the WMS would be unsuitable for such a targeted use case.

Once the customer learned more about AFW's

capabilities, the conversation quickly turned to whether AFW could be used to solve more than just the pack station issue. After an extensive analysis cycle with evaluations of multiple sites, it was determined that AFW would be recommended for approximately 70% of the industrial distributor's sites based on time to value (TTV), total cost of ownership (TCO), and licensing and implementation costs relative to Blue Yonder's WMS.

The truly adaptive nature of AFW meant that it could be applied to a range of lower-complexity sites, from their wholesale distribution operations down to their retail stores, with the flexibility to scale up and scale down sites as needed. With expert guidance from our implementation teams, AFW turned this Fortune 500 industrial distributor's paper-based DC into a flexible, agile digital operation primed for growth.



Case Study:

HERBL Cuts Operating Expenses by 20% With Blue Yonder

California's largest cannabis distributor and supply chain solutions company, HERBL, experienced explosive growth in response to skyrocketing demand, growing revenue from \$20 million to \$200 million in just three years.

HERBL needed a solution that would help them accurately predict demand, deliver sophisticated real-time tracking and traceability, optimize profitability and meet strict regulatory compliance requirements as they served over 850 retail licenses.

With a SaaS-based suite of Blue Yonder tools implemented over just four months, HERBL was able to reduce operating expenses by 20% and improve productivity by 15% through data-driven decisions that balanced high service levels with profit margin protection. Not only was Blue Yonder able to meet HERBL's immediate needs, the solution was able to futureproof operations to manage continued growth and demand.

20%
**reduction in
operating expenses**

15%
**productivity
improvement**

4 months
to go-live



Case Study:

Blue Yonder Positions Multi-National Distributor To Plan, Execute, and Fulfill Flexibly Across 388,000 SKUs and 40 Countries

As one multi-national distributor expanded into new regions, they struggled to keep supply chain and logistics processes consistent. Managing over 221,000 demand-forecasting units across 100 countries was a significant challenge. Partnering with Blue Yonder, the customer was able to achieve real-time visibility and responsiveness to demand shifts across the global operation, standardizing supply chain processes worldwide and maximizing performance and efficiency despite disruptions and market volatility.

With Blue Yonder, the customer is able to make more accurate, profitable decisions, from inventory staging to maximizing turns, and optimize over 50 warehouses and related transportation networks across the globe, while keeping costs-to-serve low. The flexibility of the solution allows them to scale effortlessly, as required.



How Digitally Mature Are Your Wholesale and Distribution Operations?

Legacy Systems

Paper-based, spreadsheet-managed environment

Your warehouse runs on paper lists and spreadsheets. Staff conduct picking and packing processes carrying paper documents, and inventory management and tracking is not perpetual.

Slow picking speed and low accuracy

Lack of task optimization functionality negatively impacts speed and accuracy on the warehouse floor. Additional staff are required and hired to compensate.

Limited or no inventory visibility across network/suppliers/locations

You have little to no inventory or supply chain visibility across different locations, suppliers, and networks. There is no visibility of available-to-promise and order release. Inventory is sourced and located via email or phone calls.

Digital Maturity

Optimized, high-accuracy picking

Automated task and labor optimization and robotics drastically increase picking speed and accuracy. Less staff are required to complete daily tasks. The right task gets done at the right time. Overall, you experience increased fill rates.

Mobile interfaces, automated task management, automated inventory updating

Your team carries mobile interfaces. SaaS-native solution manages and directs intelligent workflows for picking, packing, and shipping tasks. Inventory is automated with real-time tracking.

Full inventory visibility across network suppliers/locations

Two-sided platforms create full visibility up and down the supply chain. Your operation has real-time inventory tracking across the network, suppliers and locations, as well as full visibility of available-to-promise and order release.

How Digitally Mature Are Your Wholesale and Distribution Operations?

Legacy Systems

Using an ERP and other legacy systems and spreadsheets as WMS

Hardened ERP systems, spreadsheets and other systems are back-engineered as WMS solutions.

No access to data analytics/BI

Data is unstructured, siloed and manually processed. There is no functionality in place to analyze data and no data-driven decision-making.

Problems with accurate inventory commitment and fulfillment

Inventory accuracy is an issue. Poor inventory commitment accuracy leads to customer dissatisfaction. Lost sales and delays are commonplace.

Digital Maturity

Using a purpose-built WMS

Purpose-built, fully-integrated fulfillment solution is in place that is mobile-oriented with key operational capabilities designed to take manual, paper-based facilities to the next level.

Data is harnessed as an asset

Data automation solutions and consolidates data for business intelligence (BI) analysis and data-driven decision-making. Data analytics is used to optimize operations, gain margin, and minimize costs.

Real-time inventory accuracy

Automated inventory management and tracking deliver 100% accuracy on commitments and fulfillment resulting in lower inventory overhead and higher customer satisfaction.

How Digitally Mature Are Your Wholesale and Distribution Operations?

Legacy Systems	Digital Maturity
<p>No infrastructure to handle omni-channel execution</p> <p>You have limited ordering channels available. Customers are lost to competitors with more convenient, efficient or technologically-driven ordering capabilities.</p>	<p>Effortless omni-channel execution</p> <p>Full omni-channel execution capabilities are in place. There is low to no barrier to entry for sales and customer orders, including online ordering portals.</p>
<p>High levels of human error</p> <p>Manual processing leads to high levels of human error throughout the operation. Data entry errors lead to inventory errors, delays and lost sales.</p>	<p>Reduced human error</p> <p>Increased automation, machine learning, artificial intelligence, and the correct TMS, WMS, WES, and OMS solutions minimize or eradicate human error.</p>
<p>Frequent stockouts and overstocking, high carrying costs</p> <p>Inefficient inventory management and visibility lead to stockouts, overstocking and high carrying costs.</p>	<p>Low incidents of stockouts and overstocking, low carrying costs</p> <p>Increased automation delivers better inventory management, forecasting and visibility.</p>
<p>Heavy reliance on tenured staff</p> <p>There is heavy reliance on the legacy knowledge of tenured staff for efficient operations.</p>	<p>Easy to train, simple to master SaaS-based systems</p> <p>New staff are onboarded in a matter of hours, as opposed to weeks or months. Intuitive interfaces are easy to understand and simple to use. Overall, easy onboarding leads to less reliance on tenured staff.</p>

Digital distribution for wholesale and distribution: effortless omni-channel execution

Digital distribution is characterized by fully integrated, SaaS-native cloud-based tools connecting all aspects of your operation, from the warehouse, to the yard, to the road. With purpose-built TMS, WMS, WES, and OMS tools in place, you gain full visibility, flexibility and control.



Transportation management

- Inbound and outbound planning, execution and management
- Ability to handle exceptions
- Advanced routing and optimization
- End-to-end visibility



Warehouse execution

- Command center
- Omni-channel aware order sequencing
- Work prioritization and optimization
- Future-state aware tour building
- Yard optimization
- Resource management



Warehouse management/ fulfillment

- Labor optimization
- Inventory efficiency
- Capacity balancing
- Reduced manual intervention
- Just-in-time order tasking
- Visibility of available to promise and order release



Order management

- Precise inventory availability
- Forward inventory promising
- Increased fill rates
- Balance load across network
- Order re-allocation
- Visibility for customer orders

Growth vs. Margin: With the Right Tools, You Can Have It All

With the right tools at your disposal, leveling up your operation no longer requires a compromise on growth or margin.

Digital maturity to support a digital distribution strategy can be achieved incrementally and at a pace that fulfills your immediate business priorities and needs.

Growth

- ✓ Higher levels of automation facilitate the management of additional complexity as you grow
- ✓ Intuitive user interfaces and ease of trainability facilitate rapid onboarding of new staff
- ✓ Build supply chain resilience with real-time reporting and analysis for better forecasting, agility, and responsiveness
- ✓ SaaS-native, cloud-based tools are easy and quick to scale

Margin

- ✓ AI- and ML-infused TMS, WMS, WES, and OMS solutions improve efficiencies, boost cost-savings and optimize margins
- ✓ Optimized labor management requires less staff to complete equivalent labor
- ✓ Data-driven responses to unexpected disruptions and exceptions before they impact the business
- ✓ Composable, SaaS-native, cloud-based tools do not require heavy investment in enterprise-level solutions. Pay for what you need, as you need it

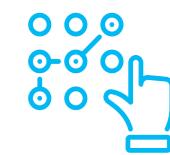


Use Cases for Digital Distribution



Omni-channel ordering

Digital distribution facilitates a seamless omni-channel experience for customers. By connecting all inbound sales channels via a centralized, integrated solution, digital distribution delivers rapid, friction-free throughput, error-free commitment, and fulfillment.



Commoditizing value-added service offerings

While many wholesalers and distributors bundle their value-added services into their product prices, there is a major opportunity to commoditize these services as separate SKUs. Customer-centric value-added services are a strong differentiator, particularly against marketplaces. Digital distribution architecture supports value-added services like pre-assembly, staggered direct-to-site delivery, kitting, customer training and more, opening up new revenue sources for wholesalers and distributors.



Competing on customer experience

Digital distribution allows wholesalers and distributors to re-orientate operations toward a customer-centric approach, delivering the e-commerce experience B2B clients have come to expect.



Tracking performance

A recent survey of 90 wholesale and distribution executives found that only 22% use analytics to measure performance [7]. With the correct digital distribution solution in place, data becomes an extension of your asset mix. With the correct analytics capabilities in place, you can make data-driven decisions regarding resource allocation, rationalization measures, performance optimization and customer prioritization. Connecting your entire operation makes this data available.



Ease of training, easy workflow

Wholesale and distribution is one of the industries hardest hit by the “Great Resignation” and resulting labor shortages. High turnover, overreliance on tenured employees, and skills shortages are leaving many wholesale and distribution operations severely understaffed. Digital distribution SaaS tools mitigate these effects because they are easy to master, train, and operate via user-friendly mobile interfaces. Increased automation and more efficient workflows mean fewer staff are required to complete the same amount of work.



Accurate inventory tracking

Research shows that average inventory accuracy is only 65% [8]. With a digital distribution solution, inventory accuracy nears 100%. When inventory is being perpetually tracked and updated in real time, staff will always know exactly what they have, where it is, and when.



Digitize your yard

Traditionally, the yard has been an overwhelmingly manual environment. Digital distribution turns the yard into an extension of the warehouse, delivering equivalent visibility, efficiency and performance gains. Digitization allows for a multitude of optimized functions, such as the coordination and management of the movement of vehicles and trailers, improved space utilization, the mitigation of delays and congestion, and real-time oversight of asset location. In combination, these optimized capabilities improve overall throughput.

A Series of Digital Distribution Solutions by Blue Yonder

Blue Yonder offers a comprehensive range of pioneering SaaS-native digital distribution tools for wholesale and distribution operations.



Blue Yonder's Adaptive Fulfillment & Warehousing (AFW)

Blue Yonder's Adaptive Fulfillment & Warehousing (AFW) is a suite of SaaS-native services designed to meet the distinct needs of wholesalers and distributors across their less complex or smaller sites. It is purpose-built to be modular so time-to-value can be accelerated by deploying capabilities that can add immediate value and expand use cases as needed.

AFW is simple, easy to use, and quick to implement. User-friendly mobile interfaces can be mastered in a few hours, making staff training and onboarding effortless.

With AFW, wholesalers and distributors can scale cost-effectively and at their own pace, choosing the path they take by deploying specific capabilities as part of a holistic strategy for growth and value delivery.

AFW

Key Features

Foundational, intuitive fulfillment solution

Includes inbound and outbound inventory visibility with a web- and mobile-based interface for rapid staff onboarding.

Seamless integration

Quick deployment is enabled through the ability to broaden capabilities across the supply chain, including to major vendors and technology such as robotics providers.

Cloud-native SaaS application

Built on a modular, services-based architecture that allows for rapid deployment, seamless upgrades and faster time to value, eliminating IT overhead.

Extensible

Deploy personalized dashboards and mobile workflows to meet operational needs.

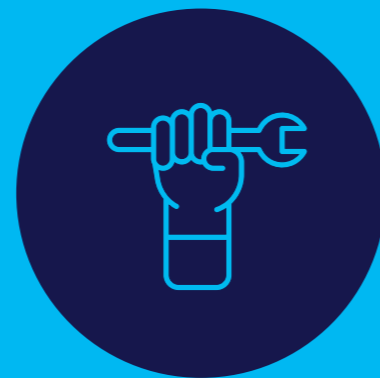
Integrated and end-to-end solutions

Blue Yonder's TMS, WMS, WES, and OMS solutions in addition to AFW are components of an integrated portfolio of Supply Chain Execution services powered by the Blue Yonder's Luminare Platform, designed to deliver value via accelerated end-to-end execution from the warehouse, to the yard, to the road, and beyond.



Load building and transportation

Improve service levels by up to 40% with load, route, and asset optimization.



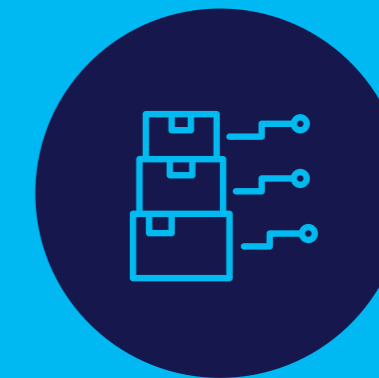
Warehouse and labor

Improve throughput by up to 50% with omni-channel efficiency and retention.



Execution and automation

Unlock greater efficiencies and cost reductions across the warehouse including an up to 12% increase in units-per-hour.



Order and availability

Automate order management to drive efficiencies, reduce costs, and deliver the experiences that customers expect.

What Are Blue Yonder's Microservices?

Blue Yonder's microservices are modular **software components** that can be composed in multiple configurations to deploy purpose-built solutions for wholesale distribution operations. Instead of purchasing a full-scale enterprise-level solution, microservices enable wholesalers and distributors to license specialized service offerings to address specific challenges or needs within their operations. Blue Yonder's microservices are composable and designed to integrate with internal and external solutions. Optimize existing tech stacks and plug gaps in digital architecture by adding the specific microservices you need, or configure lean, needs-based solutions tailored to your individual operation.



Toward Digital Maturity: Getting Started With Digital Distribution

Achieving digital maturity does not necessarily require a complete overhaul of existing systems and processes. With the right tools, a strategic series of digital pivots can bring your operation up to digital distribution standard in a phased approach, with minimal disruption and rapid time-to-value.

Step 1: Triage operational pain points

Identify your operational pain points, then triage them in order of severity. Compare actual performance against KPI and KPA target metrics. Where are you bleeding margin? Which areas of performance are the furthest off the mark? Which areas of your operation would benefit from increased visibility, automation, accuracy, or speed? Which areas have the potential to deliver the highest impact if optimized?

Blue Yonder can help you identify your pain points, the right solutions to address them, and implement a roadmap to maximize momentum and return on investment (ROI).

Step 2: Identify new opportunities

Identify new revenue streams and opportunities to enhance your offering. Ask questions like:

- How do you future-proof your business in a time of increased competition and rapid market movement?
- Are there any new or previously untapped revenue opportunities available to you?
- How can you leverage existing resources to generate additional revenue and increase customer satisfaction and spend?

Next, identify the digital tools required to facilitate the commodification of these potential revenue streams.

Step 3: Implement and activate

Look for a solution with non-disruptive implementation, quick time-to-value, and minimal training required. Blue Yonder's digital distribution solutions deliver all of the above. Once an initial site has been configured by our expert team, subsequent sites can be implemented and activated in a matter of days per location.

Why Blue Yonder?

With Blue Yonder, years of operational and implementation experience, brain trust and innovative products converge to deliver industry-leading solutions that work. Blue Yonder uses a data-driven approach through value assessment exercises to identify areas of opportunity to deliver value. Our specialists can hand-craft a solution proposal by bringing together the best services for a particular customer. Where others may take the easy approach of positioning software that can “get the job done” now, our experts take the time to provide the best value for today AND tomorrow.

Digital Distribution, Brought to You by Blue Yonder

To remain competitive in an increasingly tough market, wholesalers and distributors need to accelerate digital maturity and transition to digital distribution models without delay. With the right tools, this transition does not need to be disruptive, or capital-intensive. Scalable, composable, and extensible SaaS-native tools allow wholesalers and distributors to address urgent operational pain points, all while opening up a world of new opportunities to boost margins and profitability — without having to compromise on growth.

Consulting with a Blue Yonder expert about the best way to begin. We'll help you identify, plan and execute the right digital distribution strategy for your wholesale distribution business, bringing your operation up to speed and into the future.

Please visit <https://blueyonder.com/solutions/adaptive-fulfillment-and-warehousing> and speak with a Blue Yonder expert today.





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