celigo



The Executive Guide to Best Practices for Ecommerce Integration

eBook

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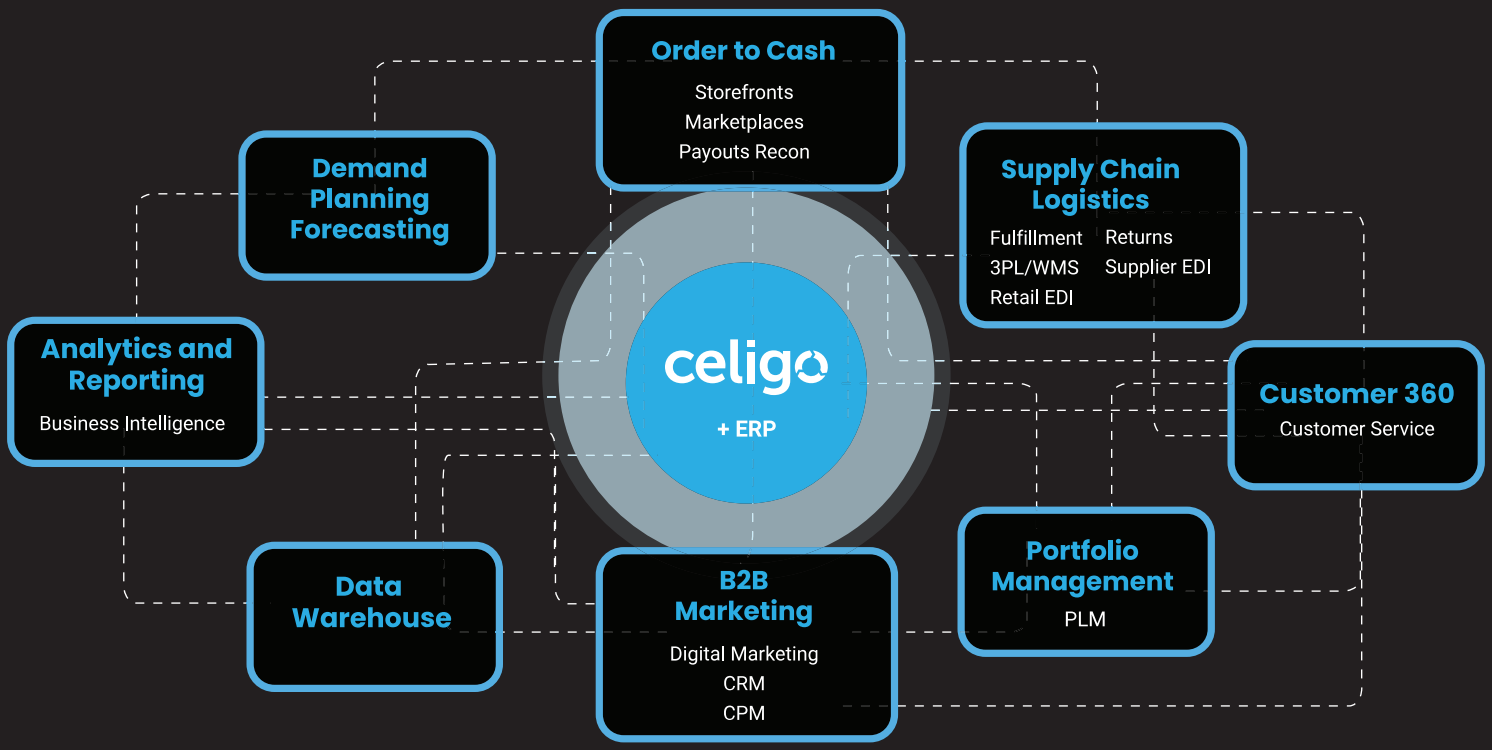


Executive Summary

In this guide, we'll discuss how automation can help businesses streamline their key ecommerce processes for operational efficiency and cost savings. We'll also cover best practices for picking the right integration solution for automation, as well as guidelines on common integration scenarios.

As a prerequisite, we recommend that your ecommerce business use an ERP system as a central hub for managing ecommerce operations across online storefronts, marketplaces, POS systems, 3PLs, warehouses, and so on. To ensure that data is seamlessly synced between all these systems, you should integrate them with an iPaaS (integration Platform as a Service).

Adopting an iPaaS enables you to automate Order Management, Fulfillment and Inventory Management, Items and Returns. We'll share best practices for implementing automation for those business processes, along with examples, case studies and the potential ROI.



Ecommerce and the Role of Integration

In today's ecommerce landscape, businesses are dependent on many isolated applications and data sources in order to bring their products in front of customers and provide a seamless shopping experience. These typically include online storefronts, marketplaces, POS systems, payment gateways, returns management and more. While these are great individual tools to serve certain business needs, they fall short in ensuring product availability, fast shipment, real time order data, positive customer reviews or financial visibility when disconnected from each other.

To streamline processes, data needs to be seamlessly transferred from one application to the other. For example, you'll need to enter sales order data from your ecommerce platform(s) into a WMS (Warehouse Management System) for fulfillment. Without automation, transferring data is slow, error-prone and resource intensive. These inefficiencies can turn into customer dissatisfaction, and increased operational costs over time.

Integrating disconnected applications and data sources automates business processes, resulting in less overhead, improved conversion rates, and faster order and shipment processing, as well as real-time visibility into financial and order data. The latter helps analyze product and sales channel performance, recognize revenue faster, have improved cash visibility, all resulting in healthier forecasting, strategic planning and decision making.

ecommerce sales were $870 billion in the US in 2021, a 14.2% increase over 2020 and a 50.5% increase over 2019. With the sudden increase in demand, which continues to grow, many businesses realized that the infrastructure in place may not be sufficient to handle the increased volume of orders and the need to efficiently scale. This amplifies the need to streamline ecommerce business processes with integration.

If your business realized the need for automation, the following sections in this guide will provide you with an overview of how to get started with integration, examples of key ecommerce business processes to automate, and how to select an integration method.



Best Practices for Ecommerce Integrations

Getting Started

Now that you've decided to automate your key ecommerce business processes with integration, the next step is to plan and identify which processes need to be automated. Use ROI as a measure to decide on what to automate.

1

Map out your ecommerce processes and list all related applications.

2

Identify the critical data that must be 100% accurate and timely.

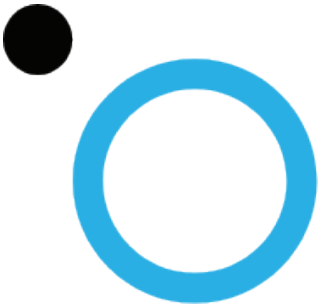
3

Identify manual, slow, resource intensive processes.

4

Calculate ROI.

- What is the labor cost of all manual processes?
- What are the costs related to delays, mistakes and unhealthy business decisions because of not having visibility into your data?
- How does this compare to TCO for automation?



Pick a Central Data Hub

With the help of integration, a central data hub will allow you to manage and unify data across multiple applications from one system. This can be an ERP (Enterprise Resource Planning) System, OMS (Order Management System) or Ecommerce Platform, among others.

At Celigo, the most popular integration approach we see from our customers is to use an ERP as their central hub.

As ecommerce businesses mature and their back-office processes become more complex, shifting away from entry level accounting systems to an ERP such as NetSuite, Acumatica, or Microsoft Dynamics 365 is inevitable. All aspects of a business, including Accounting, Order Management, Inventory Management, Procurement, Fulfillment, and Warehousing can be managed through an ERP.

Through integration, you can aggregate data from different applications into the ERP and from there, synced to relevant systems. This also makes it easy to manage a multi-channel ecommerce model by centrally managing all online sales channels within one application.

If you already have a previous integration between two systems in place that's reliable, we recommend keeping the existing integration and building a new integration only for updating records in the ERP. For example, you may already have a direct integration of your ecommerce storefront and 3PL for automating fulfillment. We'll cover more examples later in this guide.

Decide on Flow Direction and Frequency

Once you've decided on the critical data that needs to be synced between systems, the next step is to determine the flow direction and the run frequency. This really depends on the business process being automated and your current workflows. Typically data would be flowing from the origin, but there sometimes may be a need to update the data attributes bi-directionally. As an example, an ecommerce platform may be the system of record for order initiation. Order data may already be syncing from the ecommerce platform to the ERP, but a bi-directional flow from the ERP system may be needed to update the order cancellation attribute if inventory is not in stock.

Next, you need to determine if you need real-time updates or if it would be sufficient to have updates scheduled at specific time intervals. Real time integrations are great for processes such as order fulfillment because these help your teams to act fast. However, you'll also need to determine if the systems you're connecting can technically support real time updates. If it's not technically feasible, you should consider batch flows to schedule updates at specific intervals.



Suggested Roadmap for your Ecommerce Automation

Over the years at Celigo, we've worked with thousands of ecommerce customers to automate their ecommerce business processes, so that their operations can scale as their businesses grow.

Based on our experiences with helping our customers automate their processes, here's our recommended roadmap for your integrations.

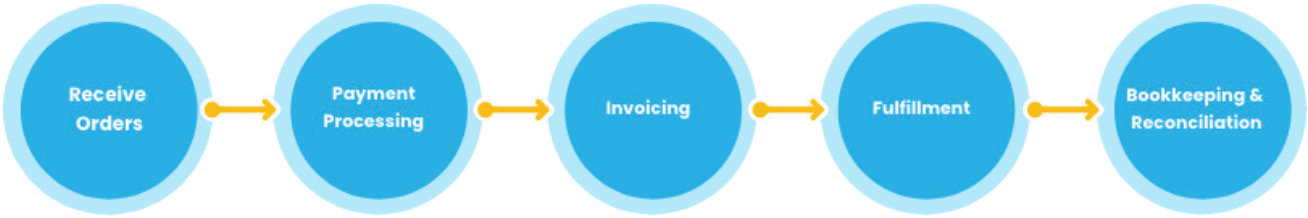


In the next section, we'll walk you through best practices for automating the business processes shown in the above diagram.



Automating Key Processes

Order Management

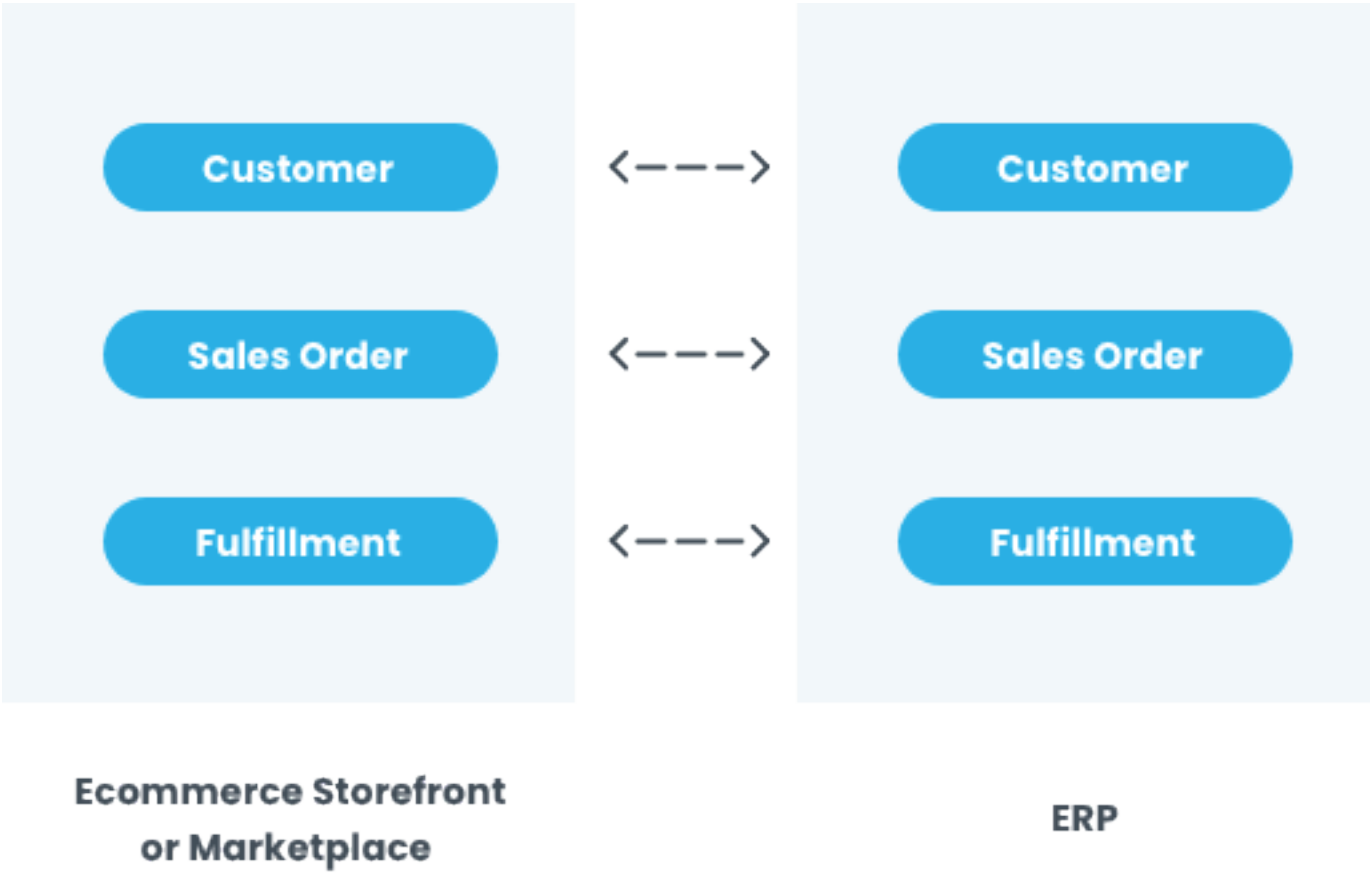


This business process starts with an order from a customer being received on an ecommerce platform and goes all the way until the payment is processed, invoiced, and the order is fulfilled.

Because the order management process is at the heart of any ecommerce business, it's often the first process that businesses look into automating. Here's why it's essential:

- Faster order processing leads to faster revenue recognition. For many businesses, an order won't be financially recognized until it's fulfilled.
- While quantity of fulfilled items or overall inventory levels plays a key role in calculating COGS (Cost of Goods Sold), billing addresses, taxes, and discounts are also critical data for accurate accounting.
- Slow and erroneous order processes result in customer dissatisfaction. This not only leads to returns and refunds, but also translates to poor customer reviews and lost repeat sales.
- Lack of visibility into sales and inventory status leads to faulty business decisions and planning, such as delayed procurement and suboptimal resource allocation.

Integration Best Practices



Customers, sales orders, and fulfillments are the most common integration flows between an ecommerce storefront and the order management system (in this case, an ERP).

Customer data entails the customer's name, billing, and shipping address. The basic requirement for B2C sales involves syncing an order from the system it is received into the ERP. A reverse flow might be needed for B2B orders, especially when they're recurring in nature.

Paid or authorized orders can be imported as sales orders in the ERP, and intermittently updated as necessary. Taxes, discounts, shipping costs, and order totals are included within order data.

Once fulfillment is completed, you can export order fulfillment data from the ERP such as shipping method, confirmation email, quantity, package tracking numbers.

Integration for Multi-Channel Ecommerce

Growing and mature businesses will typically have more than one ecommerce sales channel. It's common to start with just one online storefront, and subsequently expand to multiple marketplace platforms to generate additional revenue streams. You might also need to add new storefronts that support different languages, currencies, and tax requirements in order to sell in different countries. Another common scenario is that when products are sold under multiple brands,each brand will typically be offered through its own unique storefront.



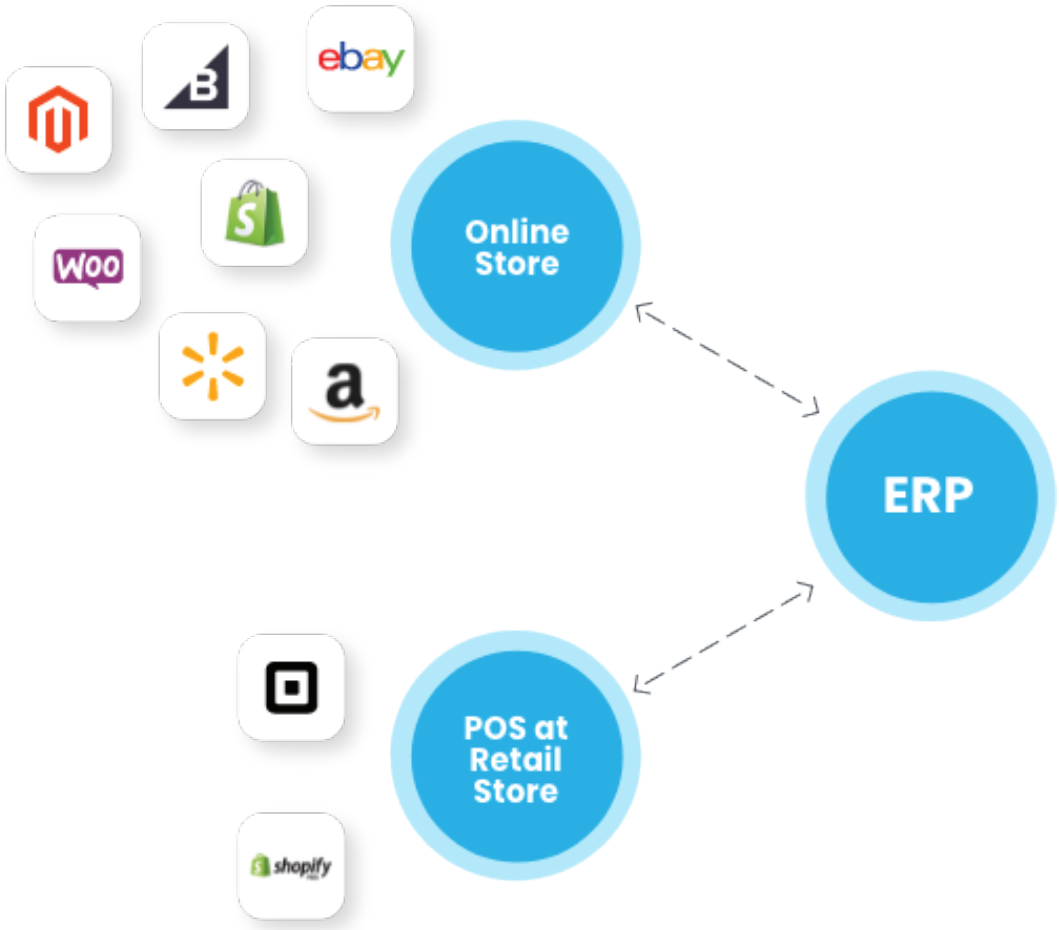
A possible integration scenario for Order Management

By integrating all online storefronts and marketplaces with an ERP, businesses will be able to easily scale with a growing number of orders coming from multiple sources without having to add additional resources to process them.

Integration for Omni-Channel Ecommerce

These days, omnichannel businesses are gaining more prominence. After all, customers are increasingly demanding seamless experiences across online and in-store shopping, and the omnichannel business model satisfies that demand.

With the recent changes in consumer behavior, particularly their desire to spend less time at retail locations or obtaining certain products with limited availability in retail locations, support for omni-channel commerce becomes a competitive advantage and helps drive more sales. From the order management side, the most common approach would be to connect a POS system into the ERP to support buying in-store and shipping to customers, or shopping online with in-store pickups.



A possible integration scenario for Order Management

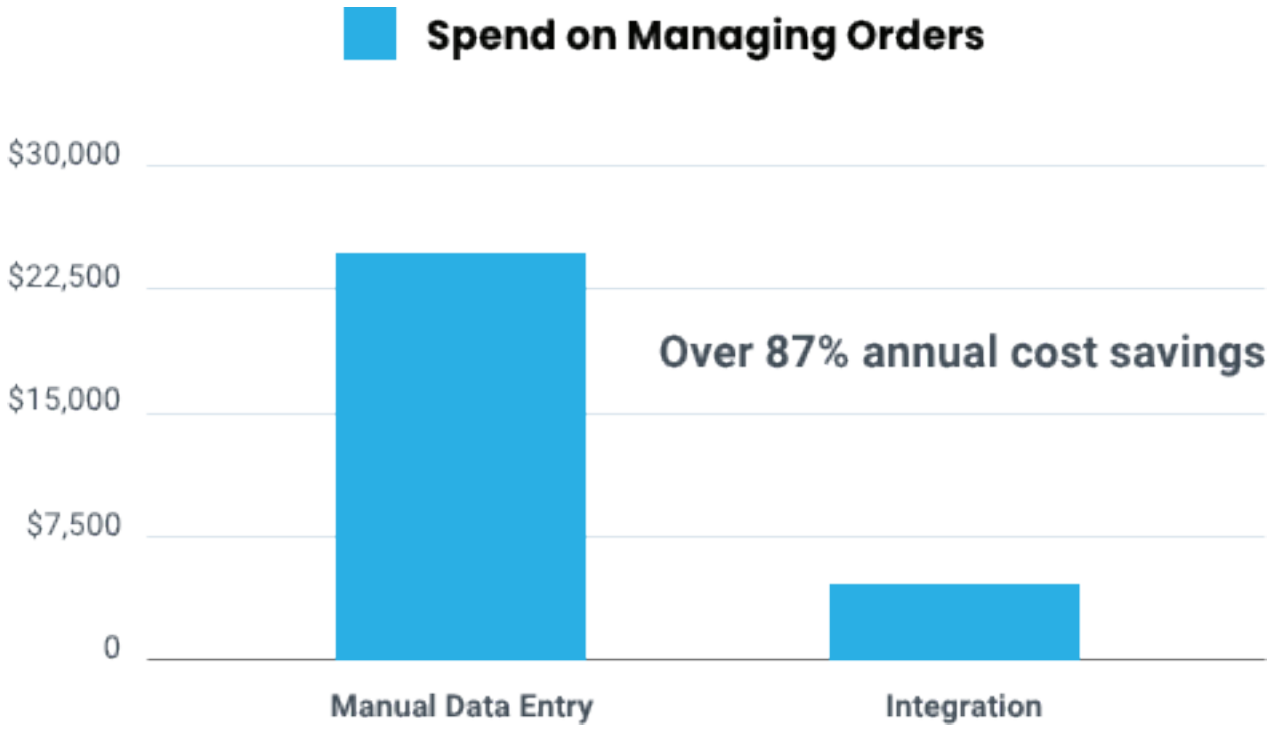
Integration not only helps with fulfillment at the desired location, but also helps with streamlining accounting processes and ensuring that inventory is accurately being tracked across different warehouse and retail locations.

Cost Savings of Automation Over Manual Processes

You can easily evaluate the ROI of automation if you approach it from an operational costs standpoint.

Let's assume one person spends 20 hours every week manually entering data between two systems. Assuming that the typical rate for a data entry job is $25/hour, this simple data entry task would cost your business $24K annually. This figure doesn't include surprise costs that might arise from incorrect data entry, such as reworking mistaken order information. For a business with higher order volumes, these costs will be much larger as the amount of actual manual work will be based on order volume and the amount of applications being used.

If we estimate the cost of a simple order management integration between two applications as $3000 a year, this would result in over 87% annual cost savings.



Comparison of cost for managing orders

Case Study

How enviolo Automated Order Management

enviolo, a European bicycle component manufacturer, used Shopify to accept B2B sales orders from bike repair shops. With every order received, they needed to manually create new customer profiles in both NetSuite and Shopify. On top of this, every order had to be manually copied and pasted from Shopify to NetSuite for fulfillment. The manual processes not only led to delays in fulfillment, but also resulted in shipping of incorrect items, due to mistakes in entering the order information. This all resulted in less than ideal customer experience.

By integrating Shopify with NetSuite through Celigo, they were able to automatically sync order, fulfillment, inventory, and billing, among others, between the two systems. As a result of the integration, they were able to process orders faster and more accurately, gaining real time visibility into inventory levels. This all helped them deliver a better customer experience, while also freeing up resources from order processing to focus on new meaningful tasks.



"Connecting the front and back-end streamlined our order-to-cash process in a way that we now know exactly which orders are paid and when they are paid. Our team members who used to process orders manually are now doing more meaningful work that better impacts our bottom line.

Billy van den Ende
Director of Brand Experience
enviolo

Inventory Management and Fulfillment

When it comes to fulfillment, a business may be operating their own warehouses, outsourcing fulfillment to a 3PL, or a combination of both. In the latter case, inventory will be split between the different warehouses.

When inventory management and fulfillment are not automated:

- Delays and errors with order fulfillments lead to frustrated customers. Given that 40% of ecommerce revenue comes from returning or repeat buyers, providing customers with a high-quality experience should be the ultimate goal for every business.
- Once there are multiple warehouse locations and/or 3PL providers to manage, maintaining complete visibility into inventory and fulfillment statuses gets more complicated.
- Lack of visibility into inventory across warehouses and 3PLs can result in stock-outs, delayed procurement, and lost revenue for a business.

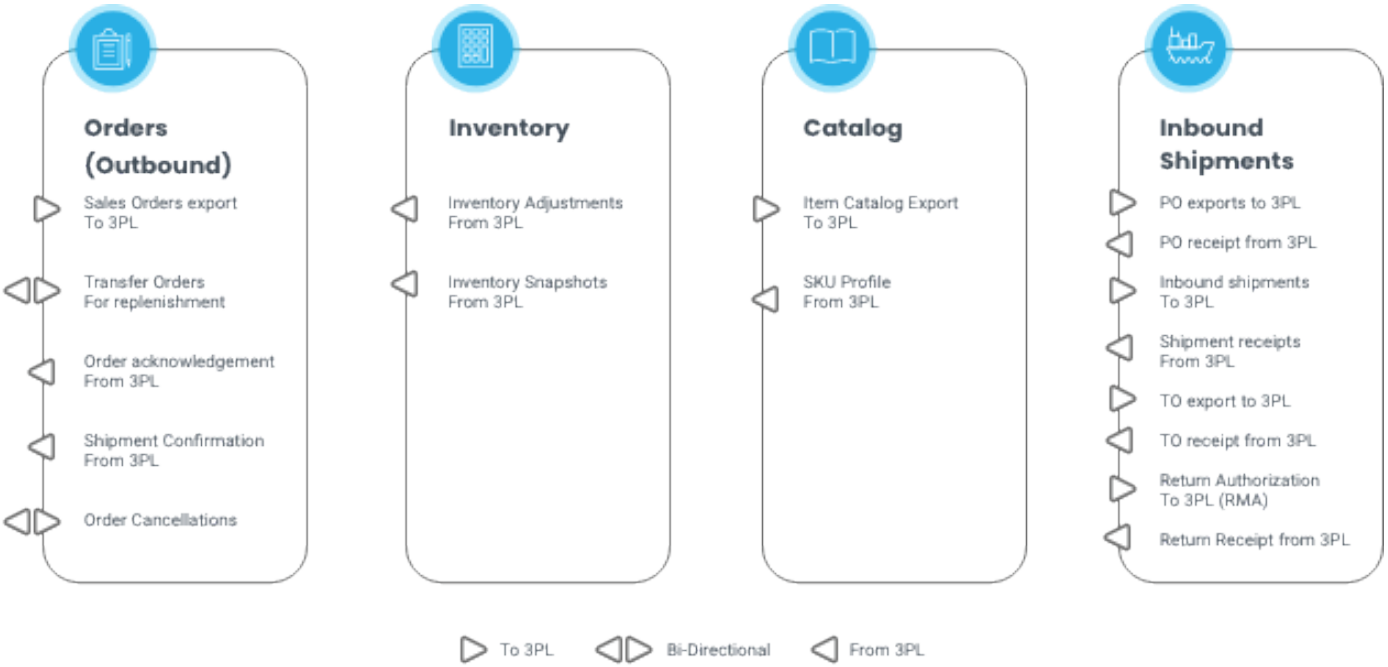


Integration Best Practices

Automating Fulfillment and Inventory Management with Integration

Common Data Flows between 3PL and an Order Management System

The most common scenario is for the ERP system to serve as the system of record for inventory levels. New sales orders and cancellations would be synced from ERP to 3PL, and shipment confirmations would be synced from 3PL to ERP. In order to help maintain accurate inventory levels across systems, inventory adjustments would be synced from 3PL to ERP.



Example data flow between 3PL, ERP and Storefront/Marketplace



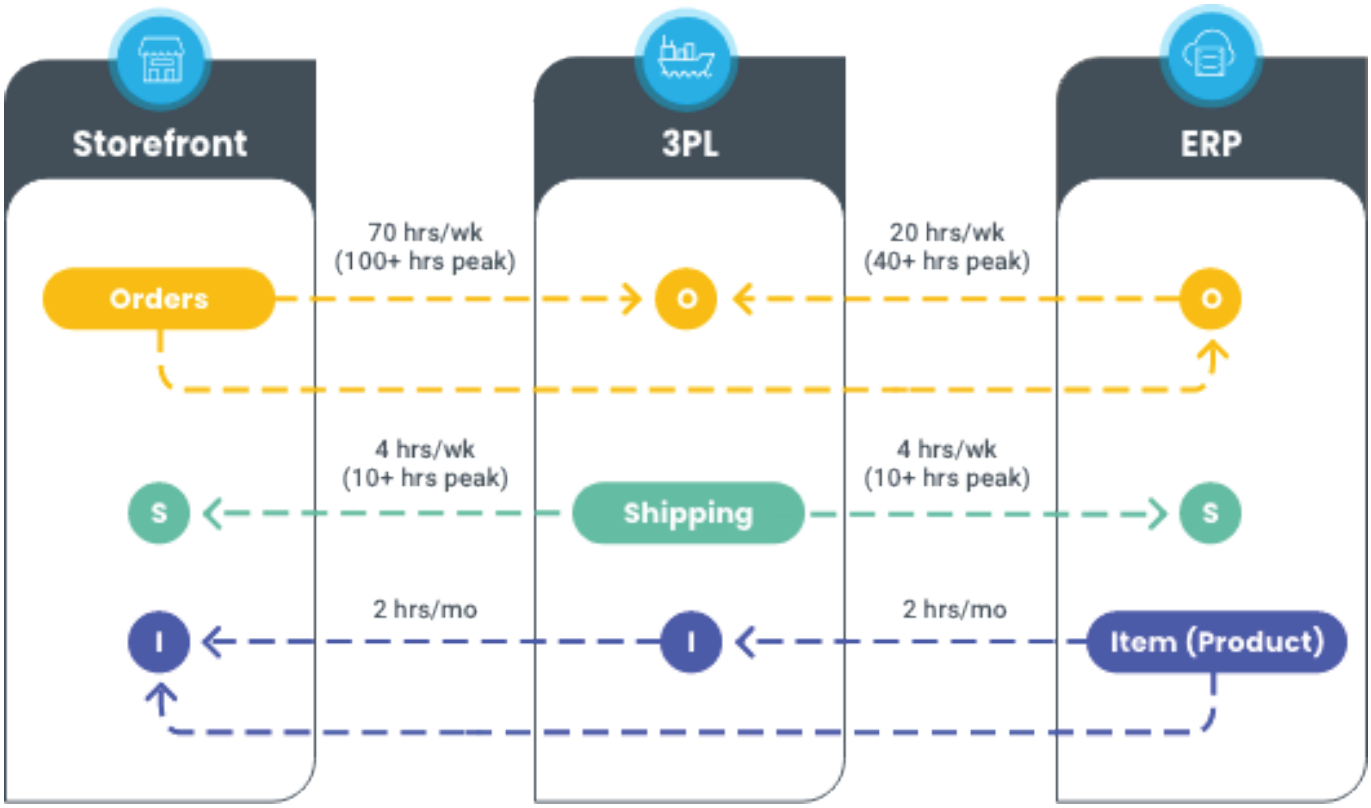
Integrating for Accurate Record Keeping in ERP



Example processes when 3PL is directly integrated with Storefront/Marketplace

Although not the recommended path, in some cases a business may prefer to build direct integration between their 3PL and their order management system. This bypasses any potential limitations of the ERP in handling high data loads. Another scenario could be that there already exists a direct integration between the 3PL and Ecommerce Storefront or Marketplace in place. In any of these scenarios, you'd still need to integrate with your ERP for accurate record keeping. Your existing integrations would sync received orders into 3PL and then sync back shipment confirmations from 3PL directly into the storefront/marketplace. An additional integration from these two endpoints to the ERP would need to be built in order to keep the order and fulfillment data up-to-date in your accounting system.

Cost Savings of Automation Over Manual Processes



Example workflow for 3PL

Here's an example of a typical 3PL fulfillment process. Entering order and shipping data alone can easily take 98 hours a week, which translates into 2 full time employees whose sole role would be data entry into those systems.

With integration, this whole process can be automated without requiring any human intervention.

Case study

How Lights4Fun Got a Cost-Effective, Fully Integrated Solution

Lights4Fun is an omni-channel business selling over 700 types of decorative lights for home and garden, based in the UK. As an omni-channel business, they run a global enterprise selling across key markets in Europe and North America.

The business was operating across disparate systems, receiving, and fulfilling orders across 14 online marketplaces, including international Amazon and eBay marketplaces, and Shopify storefronts. To fulfill orders across different countries, they were also working with various 3PLs in the US, UK and Germany.

As a result, they did not have visibility into stock levels across all warehouses, resulting in selling out-of-stock items to customers. Sales teams did not have any visibility into procurement or when items would be back in stock. As the business was growing, they were missing on key growth opportunities due to spending too much time on manual processes to update data across systems. With Celigo's iPaaS, they were able to connect all marketplaces, 3PLs, their ERP to gain a unified view of their prospects, customers, products, prices, sales orders and stock levels. Now they had the critical element that would help them scale operations: complete, real-time visibility of stock levels across the business.



> *"With this seamless integration with Celigo, everything is always aligned, and we know that the data we're looking at is actually correct. So rather than having to spend that time verifying what we see, we can dive deeper into the data. We essentially grow the business by using these tools.*

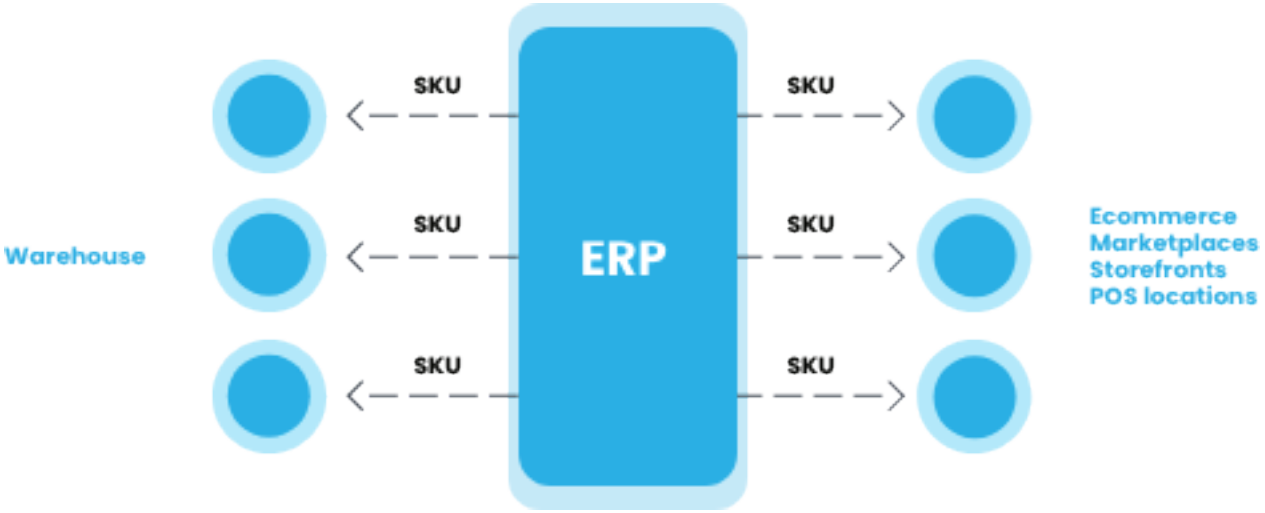
Kieran Eblett
Finance Director at Lights4Fun

Check out the full case study here.

Item Management

Accurate item data is critical for the sales, marketing, storage, fulfillment and distribution of your products.

If item management isn't automated, it can consume a vast amount of operational resources. As businesses look to generate more revenue streams by reaching wider audiences with more sales channels, this can include different marketplaces, storefronts across different geographies, and new POS locations. This necessitates diversifying warehouse locations to enable fast fulfillment. Items would now need to be populated across all the sales channels and warehouse locations to support sales and fulfillment.



SKUs need to be updated across all warehouses and sales channels

As the number of SKUs increase, the amount of work required will increase. Aside from being costly and resource-intensive, here's what else can go wrong when there's no automation in place:

- Managing a large number of SKUs across multiple channels in multiple currencies slows down time to market.
- Not having items unified across systems will make it difficult to understand product performance and can lead to faultystrategic product decisions.
- Marketing updates to improve sales, such as pricing, new images, keywords for SEO, and updated descriptions, will be more difficult to execute. Delays and mistakes in updates can result in low conversion rates.

- When item data is not accurate across warehousing and fulfillment locations, this can result in products becoming unsellable due to poor storage and handling, or returns due to not following shipping requirements.

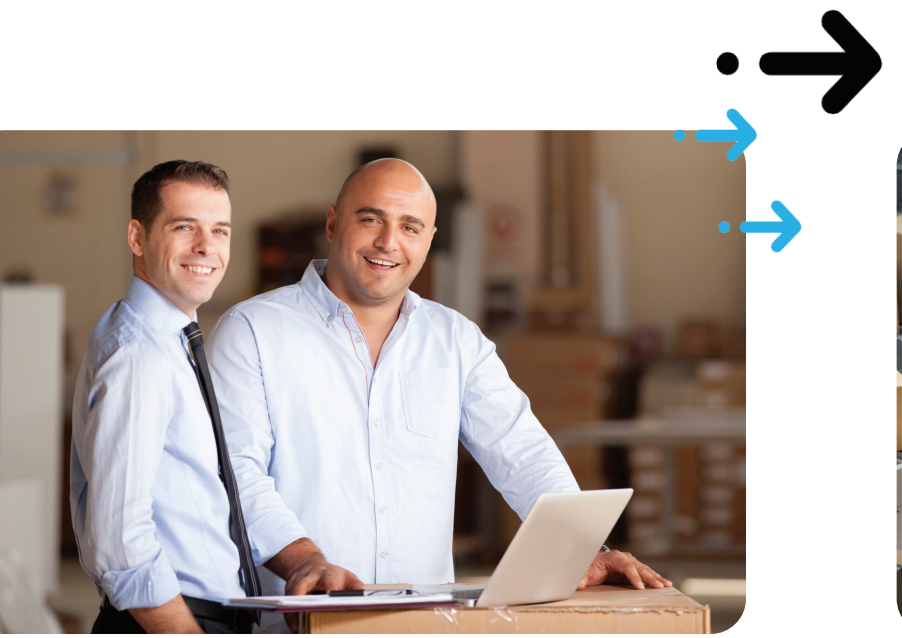
Best Practices for Integration

When it comes to item management, cross-functional teams may be involved. The best approach is to first review the existing workflows and systems with the teams managing the data.

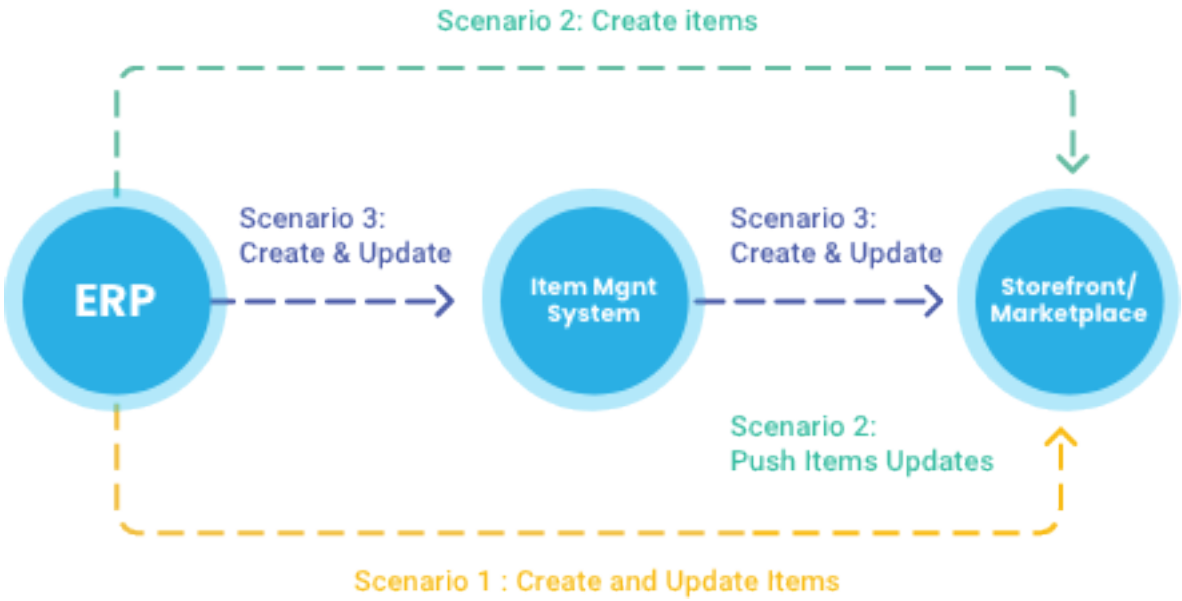
An automated item management business process most commonly involves syncing product categories, descriptions, images, variations, and pricing.

Using Integrations to Sell Across Ecommerce Storefronts and Marketplaces

At large companies, marketing teams will often use their own tools to update pricing, product descriptions, images, etc. However, these teams don't typically have access to ERP systems. To eliminate the back and forth between marketing and finance/operations teams, a direct integration between ERP and Ecommerce Storefront/Marketplace can be leveraged to create the Item SKUs and data needed for marketing. Sales data can be populated through Item Management systems, such as PIMs or Feed Managers.



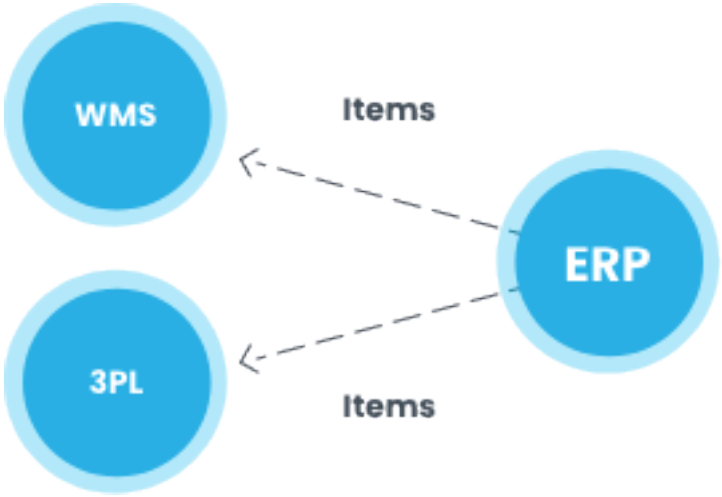




A possible integration scenario for Item Management

Another approach we've seen is when businesses start selling in smaller markets with less control and customization needs, for instance local ecommerce marketplaces in Europe. In such a scenario, an item management system can be used for connecting to these small, localized marketplaces.

Warehousing and Fulfillment Integrations

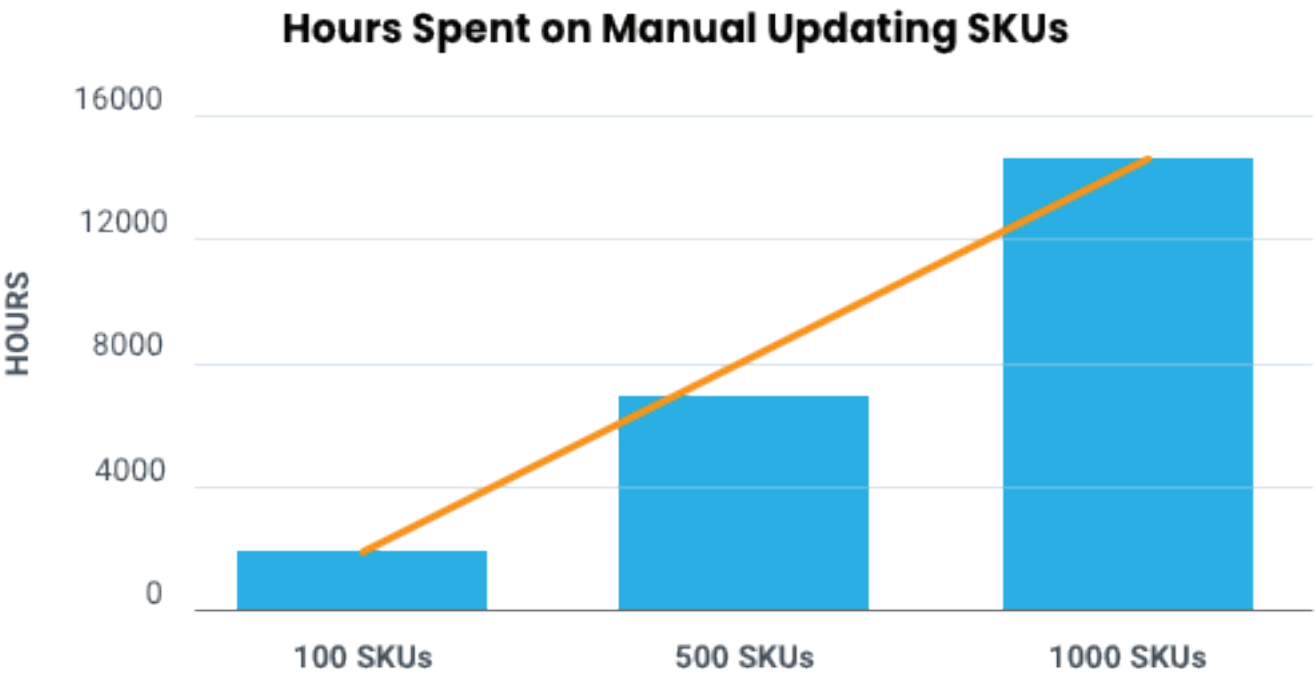


A possible integration scenario for Item Management

Warehousing and fulfillment are also prime examples of item management processes that need to be automated. When businesses start supporting geographically diverse markets, it is critical to

begin diversifying fulfillment locations. Certain products have storage and handling requirements for warehousing and shipping. Product dimensions, weight, and storage conditions such as temperature and expiration dates are critical information to keep up-to-date. When this information is not accurate, products can easily become unsellable. If a business is leveraging a 3PL provider, they may end up overpaying.

Cost Savings of Automation Over Manual Processes

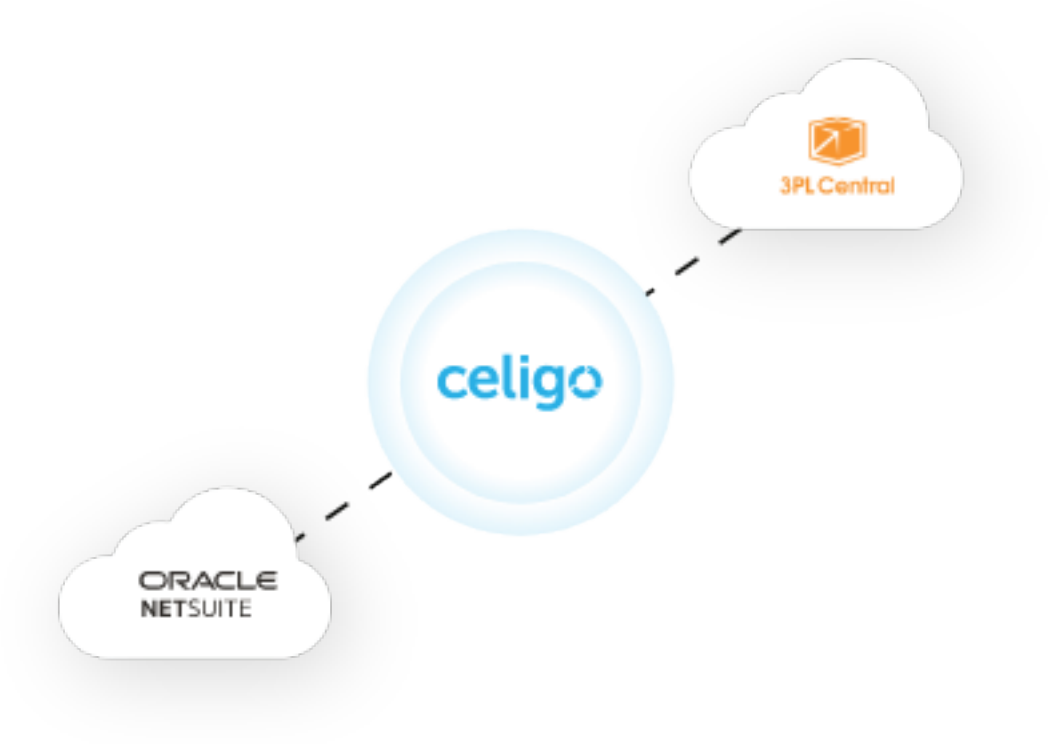


Let's assume one employee takes 10 minutes to update an Item on the ERP, another 10 to update the ecommerce platform, and a further 10 to update the WMS. If that business is managing 500 SKUs, this means they could spend 250 hours just on updating items across all three channels.

With automation achieved through integration, data will be pushed out to all channels automatically without investing any time or resources in the process. Any errors due to typos and miskeys will be also eliminated, ensuring item data is accurate across listings.

Case Study

How Specialty Incentives Automated Item Management with a WMS - ERP Integration



Specialty Incentives was managing multiple ecommerce storefronts selling hundreds of items per store, with their latest store featuring over 500 items. They had to manually import items into NetSuite by uploading csv files and then manually entering the data into their 3PL system. They used Celigo to integrate NetSuite into their warehouse's WMS.

With integration, they were able to automatically import items from NetSuite into their 3PL, then send back the Item ID created in the 3PL as a NetSuite Item record. Sales orders were imported from NetSuite to the 3PL based on the 3PL item ID.

Any updates to products were now automatically synced from NetSuite to the warehouse. As a result of the automation, they doubled their number of online stores with just one specialist maintaining them. It also saved them significant time when adding new stores because the warehouse no longer needed the extra time it took to manually create all the items in their systems.

If you're interested in the full story, watch this webinar to learn more.

Returns Management

The ecommerce landscape is more crowded than ever, and providing customers with easy return methods is one way to stand out from the competition. However, if not planned carefully, returns can drive frustrated customers away while saddling the business with high expenses.

According to a recent report, 80% of consumers think about the returns experience before buying and 73% say they won't shop again with a brand after a poor returns experience.

For a streamlined returns management process, customers need to be able to easily initiate and ship returns, with the business providing them with real-time visibility into their returns and refund status. For businesses, visibility into returned inventory and status of returned items is important for accurate revenue recognition, reselling, and inventory planning.

When returned goods are not accurately tracked, this can result in unnecessary expenses such as:

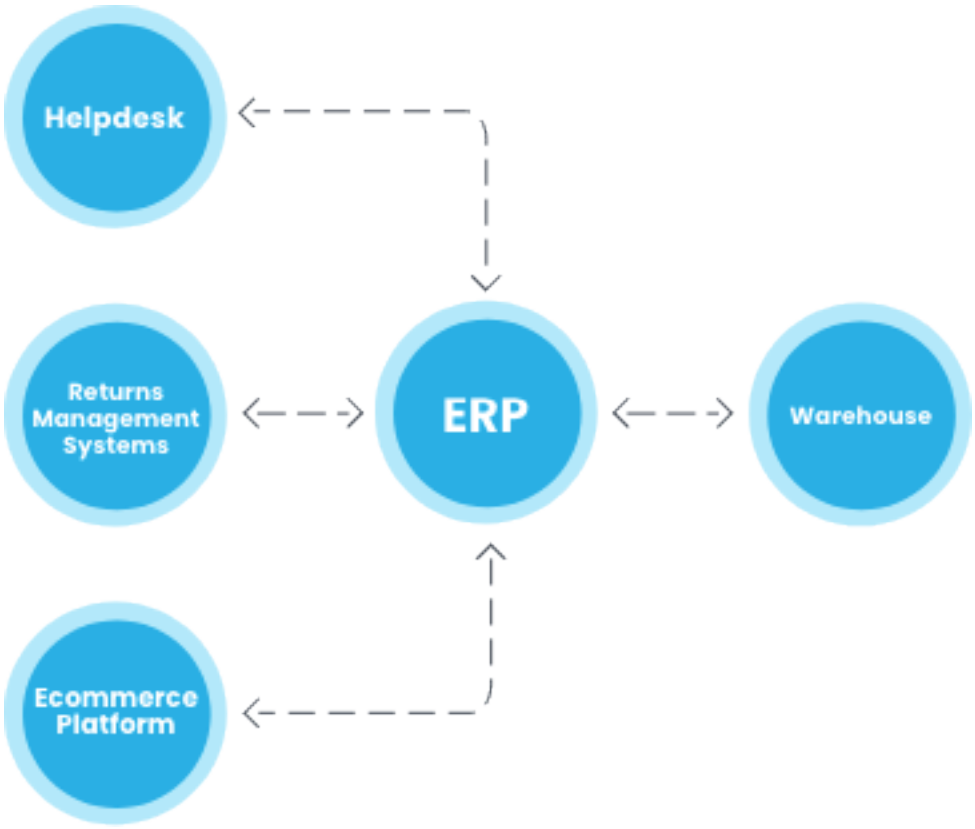
- Manually entering data between Helpdesk, Returns Management, Ecommerce, Retail and 3PL systems as a resource intensive task.
- Returned goods not being sellable due to poor visibility into status of items.
- Excess inventory due to inaccurate impressions of inventory levels.

On the other hand, the returns management process can be automated to bring the following benefits:

- Build customer loyalty driving repeat sales
- Stand out from the competition by providing customers a smooth returns experience

- Improve cash flows through accurate tracking of returns and refunds
- Make healthier business decisions based on accurate financial data
- Reduce operational costs by eliminating error-prone, time consuming manual data entry

Best Practices for Integration



A Possible integration for Returns Management

Returns can be initiated through a helpdesk, self-service return management system, ecommerce platform, or a retail POS location. To automate the returns management process, you'll need to sync key data such as RMAs, Item Receipts, and Refunds.

While out-of-the-box returns management applications are great at providing an easy returns experience for customers, these typically won't resolve back-office challenges.

When a customer initiates the returns process, an RMA (Returns Merchandize Authorization) is issued to kick off the workflow. If this wasn't initiated within the ERP, it needs to be synced from the system of origin to the ERP, and then to the warehouse. Many businesses do not sync an RMA to the ERP before the customer actually ships the item. Most commonly, refunds are issued either when the customer ships the item or when the item is received by the warehouse. For the latter situation, returns receipts need to be synced from the receiving warehouse to the ERP to issue the refund. The status of the returned goods, particularly whether it is sellable or damaged, can be typically tracked in the ERP.

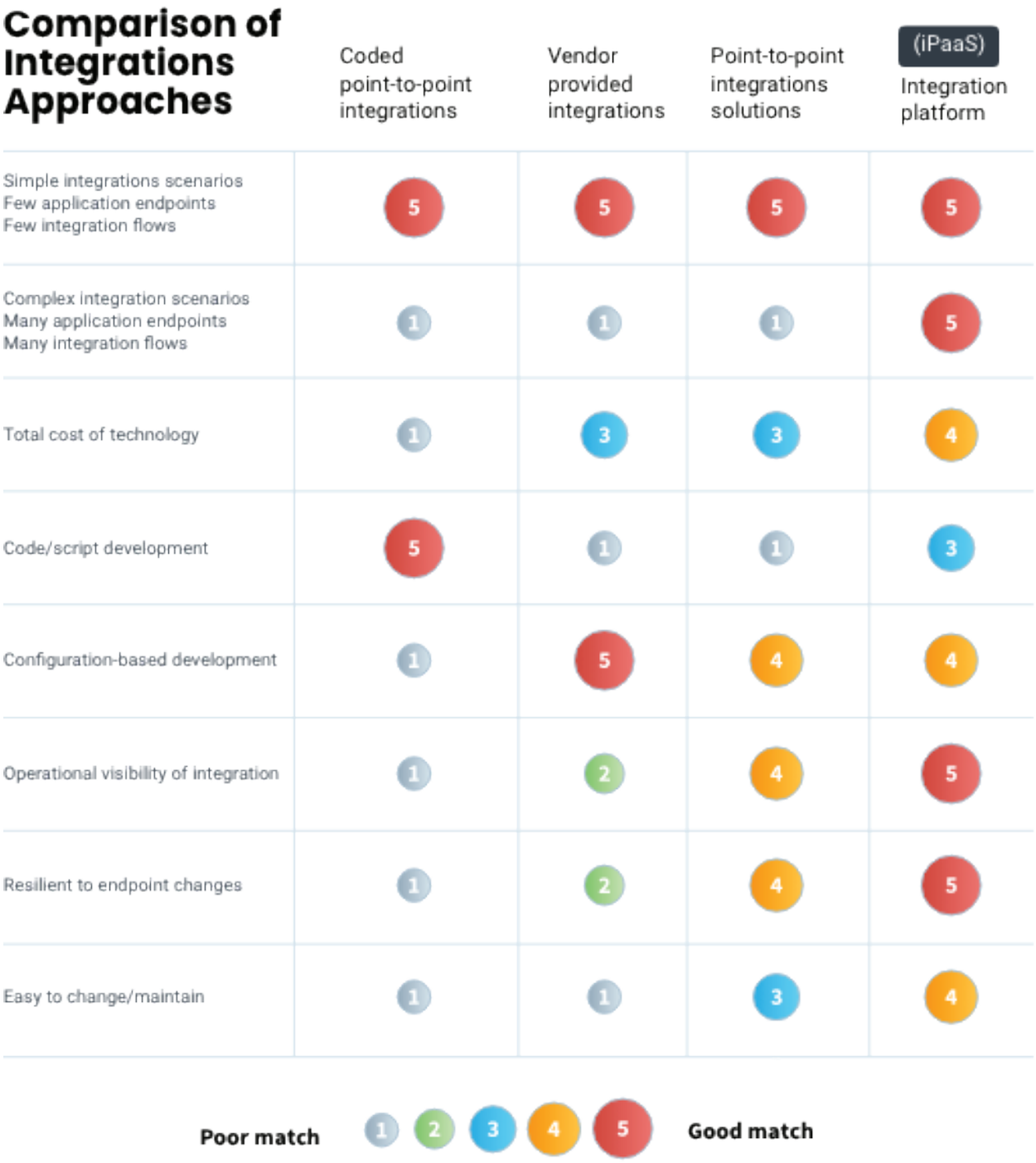
By automating returns and refunds processing, businesses can accurately track their sellable inventory, have better visibility into their cash flows, and do healthier financial forecasting.

To learn more on how to automate returns management with integration, check out this eBook.



How to Select an Integration Method

Selecting the Right Solution: Comparing Integration Approaches



Coded point-to-point integrations

In this approach, a developer is writing code to integrate APIs. This is done by an internal or external development resource. An API integration tool, like Cloud Elements, may be used to help expedite the integration development or developers just code directly to the API.

When to consider this approach

- You only have a couple of applications to integrate to a hub app, i.e. 1-2
- You already have IT developers on staff with bandwidth to implement, manage, and maintain the integrations
- You don't want to leverage third-party solutions

Cautions

- If you have more than a couple of applications to integrate, writing custom code for each integration may take too long to meet business needs (average of 41 days per integration)
- Custom integrations require a dedicated resource(s) to maintain and manage as business teams will have no visibility to errors or any ability to make changes without using IT
- IT will need to resolve any integration errors
- If integrations are mission-critical and time-sensitive, you will need to staff for 24X7X365 rapid response support
- You will need to create a process to be made aware of endpoint (API) changes to avoid unintended downtime



Vendor provided (native) integrations

This approach is relatively common as many apps provide native integrations to large hub applications like Salesforce.com. In this approach, the vendor has built an integration that typically a business system admin configures to exchange data between their app and one other. For example, HubSpot to Salesforce.

When to consider this approach

- You don't have any unique or custom integration requirements
- You don't have a need to send the same data to multiple other applications

Cautions

- You may have to buy a higher tiered version of the respective apps to gain access to the APIs and integration services
- It is hard to customize these integrations outside of what the vendor provides out-of-the-box
- Determine who is responsible and a process for managing errors as typically only system admins have the necessary visibility
- Visibility and error handling is basic often with no ability to recover without resending the record from the source system or manually re-keying





Point-to-point integration solutions

These solutions are typically built for individual tech-savvy business users to enable relatively simple integrations between the systems they use. They provide a highly abstracted view of the underlying APIs that enable users to configure integrations so no specialized skills are needed. Users typically need admin access to the systems they are trying to integrate or access to API keys. Example solution providers are FarApp and Zapier.

When to consider this approach

- You have individual or department level integration needs
- You only have a couple of apps to integrate with a handful of simple integration flows
- Business teams own apps and integrations

Cautions

- Because of the high abstract interface, it is hard to customize integrations outside of what the solution provider has built
- These solutions do not scale well to organization-wide use
- Pricing is “task” based which can get expensive if you have large numbers of small data packets moving between systems
- Visibility and error handling is basic
- There are no checks to ensure integrations are not stepping on each other, i.e. different integrations are mapping different values to the same field
- It is very difficult to perform audits when there is a proliferation of point-to-point integration

Integration Platform as a Service (iPaaS)

This class of integration solutions is relatively new to the market, coming up in the past 5-7 years. The are designed to eliminate the problems that often result from a proliferation of point-to-point integrations by providing centralized integration management. Like point-topoint solutions, they abstract APIs to enable configuration of connections from apps to the iPaaS. Beyond that, the user experience can vary widely. Some iPaaS solutions are built for large enterprise use cases so they are more like integration "toolkits" better suited for IT use, such as Dell Boomi, Jitterbit, and Mulesoft. Others offer more pre-built integrations designed to help organizations get started quickly and the ability to build custom integrations to serve any use case. These solutions tend to serve midsize companies better as they can be used by both business and IT teams to build simple to complex integrations. Celigo provides a best in class iPaaS solution that caters to the mid-market.

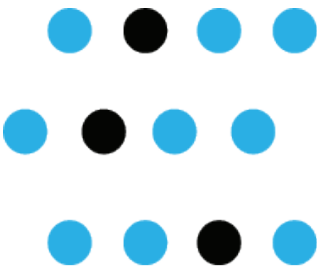
When to consider this approach

- Your integrations are mission-critical
- You have a mix of complex and simple integrations
- You have multiple applications to integrate
- You want business teams to manage and maintain integrations, not your IT team
- Your integration requirements are fluid and change often
- You need to build custom integrations
- You need advanced operational visibility into your integration performance, including error handling and auto-recovery

Cautions

- Not all iPaaS solutions are the same, so develop a checklist of your specific requirements
- Ensure you are not paying for enterprise-level features you will never use

To learn more about iPaaS, check out this eBook.



Next Steps

Every business functions differently, so the approach for selecting a central data hub and roadmapping an integration strategy depends on your specific needs. To determine what works best for your specific business, we recommend that you discuss with an ecommerce integration expert.

Contact info@celigo.com to schedule a free consultation with one of Celigo's integration experts today.

About Celigo

At Celigo, we enable breakaway growth, controlled cost management, and superior customer experiences by ensuring that every process – at any level of the organization – can be automated in the most optimal way. The Celigo platform is a complete integration platform as a service that allows business users and developers alike to automate both common and custom business processes and move the management of them into the teams that own that process, enabling business teams to innovate faster and become more agile while providing IT with the capabilities they need to ensure unified best practices, data security and scalability to meet the needs of the business today and in the future.

Find out more by visiting our website at www.celigo.com, or email us at info@celigo.com.

celigo

Hundreds of applications.
Thousands of business processes.
Millions of combinations.
ONE iPaaS.

1820 Gateway Drive, Suite 260
San Mateo, CA 94404 USA
650.579.0210

www.celigo.com
sales@celigo.com

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March 2023