

# B2C AUTOMATION

## USE CASES DOCUMENTATION

Prepared for  
**BigCommerce Merchants**

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# 2025

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## INTRODUCTION

EXPLORE CONNECTPOS



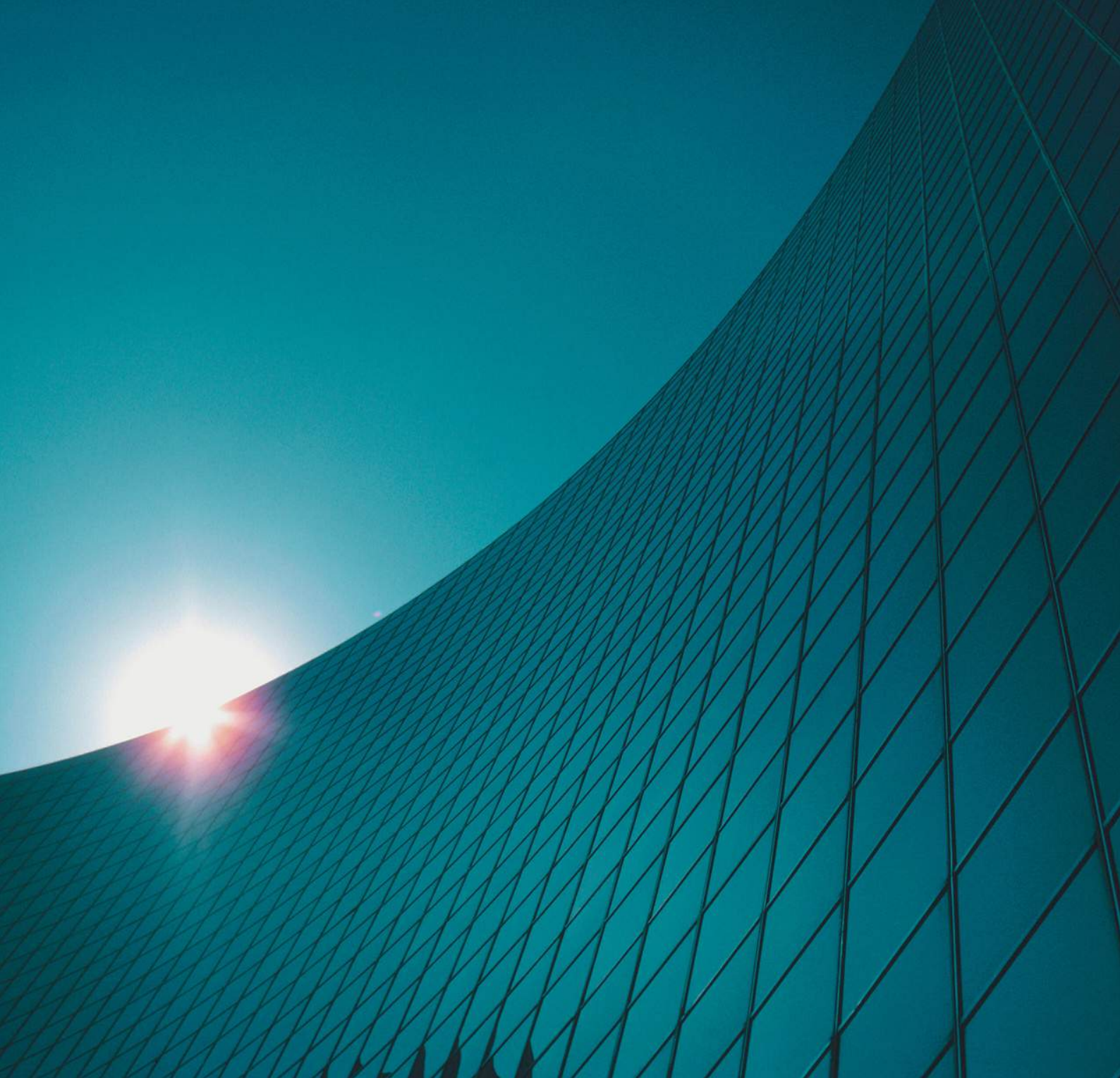
# Automate your BigCommerce store

# Unlock operations efficiency

**Automation Software** by **ConnectPOS** is a workflow automation application designed to streamline tasks and processes within your store and across your apps on the BigCommerce platform. With high-performance automation and an intuitive drag-and-drop interface, Atom8 empowers BigCommerce merchants to quickly enhance operational efficiency and improve customer experiences.

Atom8 is available to businesses in all countries on the Standard, Enterprise, and B2B Editions, providing regional support.





## USE CASES

# Scheduling

# Schedule Sales Promotion

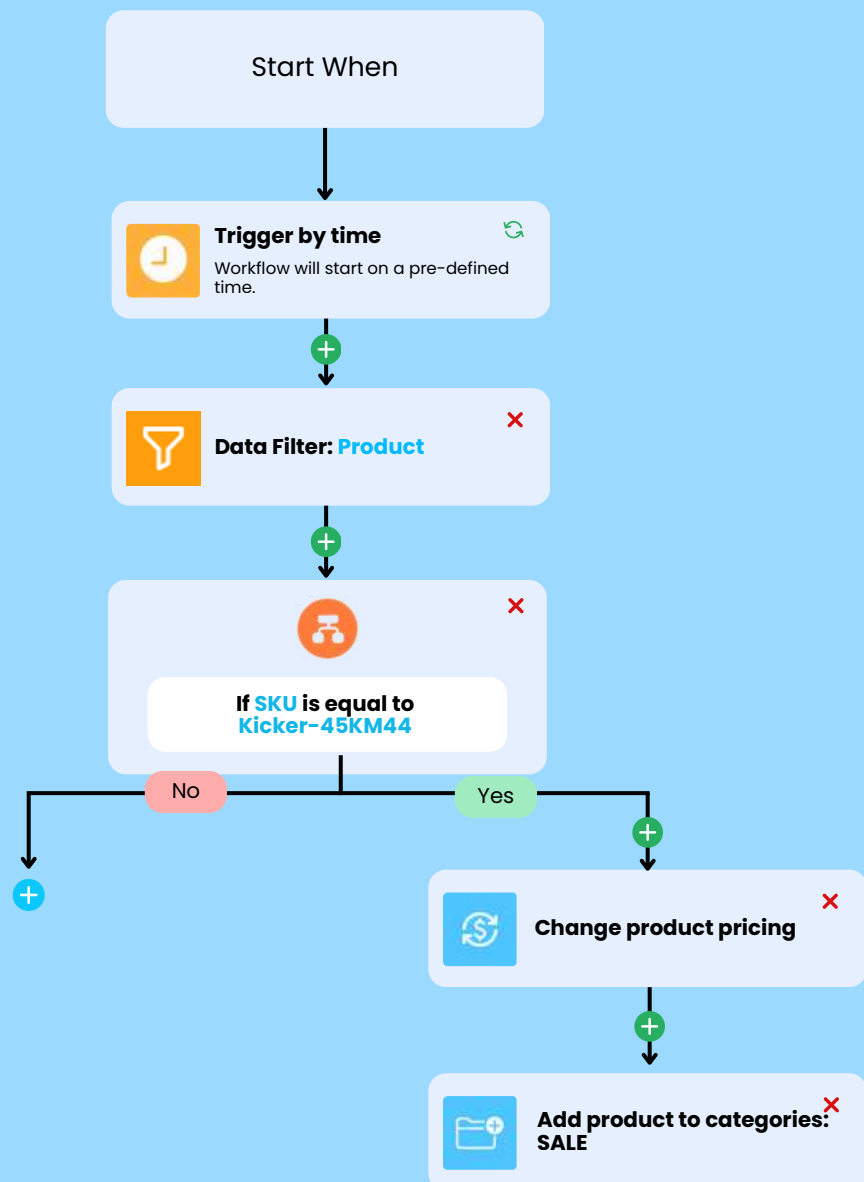
- **Use case description:** Automating sales promotions updates product pricing and categorization at scheduled times, with the option to revert prices and categories after the promotion ends, removing excessive manual tasks and late-night updating to sales pricing.

## Trigger

- Time set up

## Action

- Change product pricing
- Add product to categories



# Schedule Content

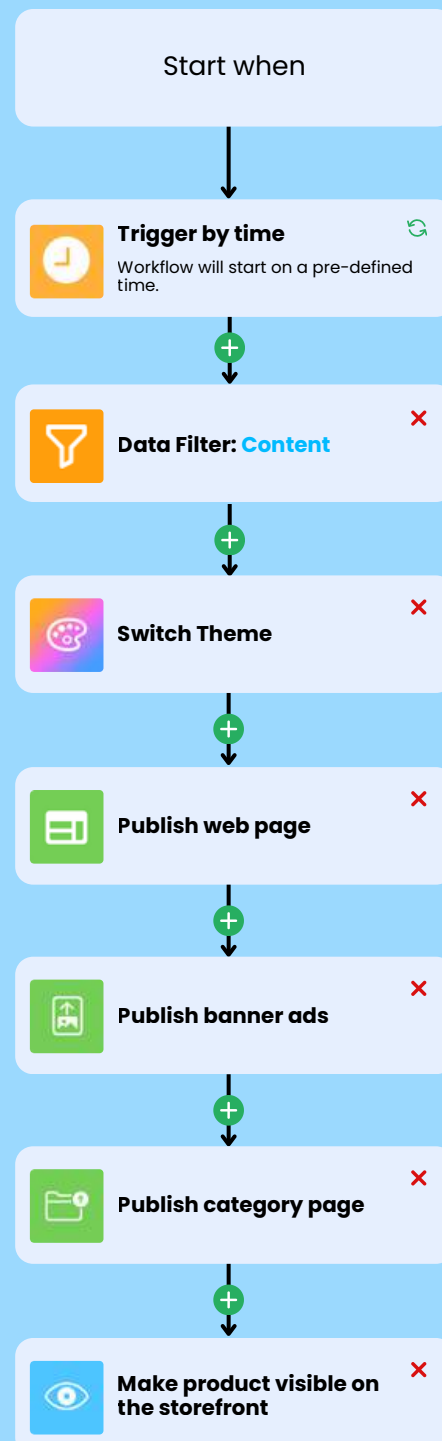
- **Use case description:** Automating content scheduling allows you to select and publish specific content for your promotion campaign, including making seasonal products visible, with the option to unpublish all content after the campaign ends.

## Trigger

- Time set up

## Action

- Switch theme
- Publish web page
- Publish banner ads
- Publish category page



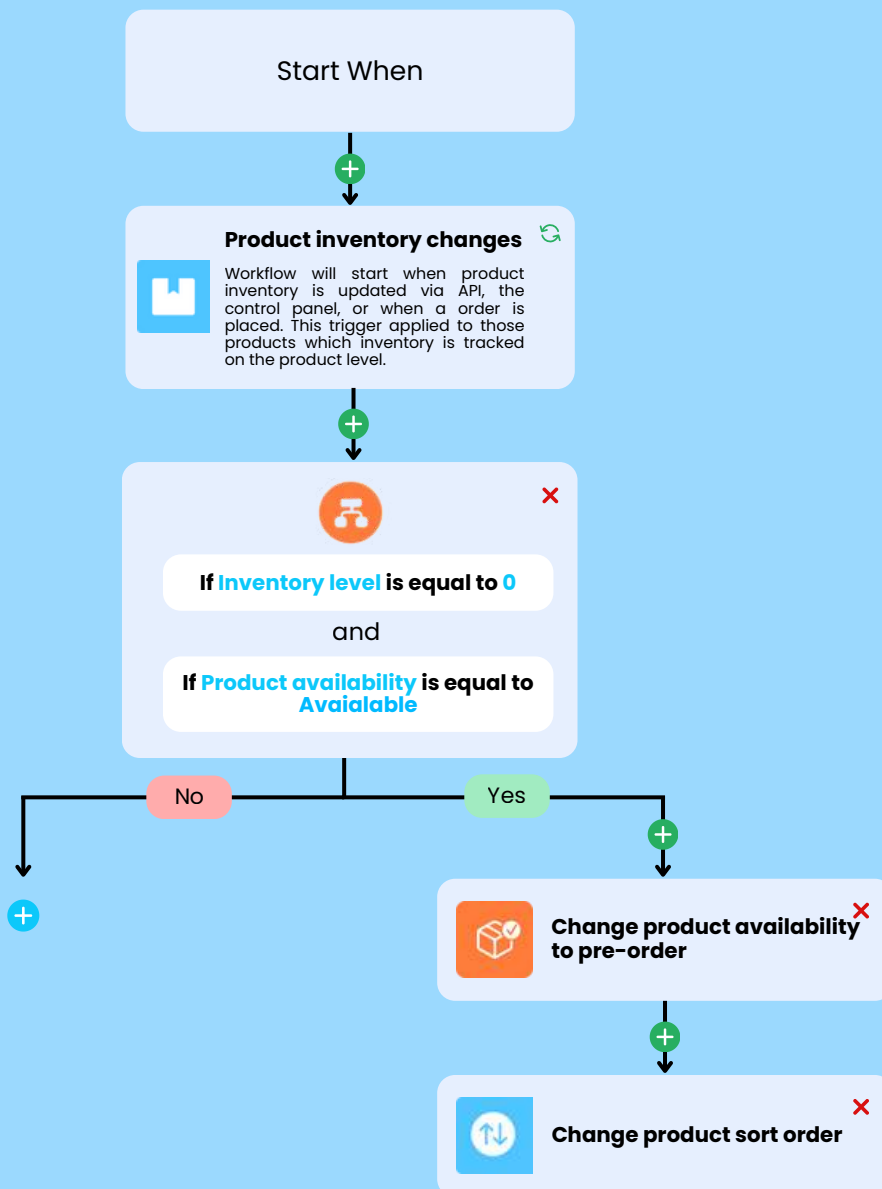


## USE CASES

# Product Management

# Change Product Availability for Zero Inventory

- **Use case description:** Automating stock management ensures timely actions when inventory drops to 0, such as enabling pre-order (streamlining with **BackOrder**), disabling product visibility, or notifying team members for re-ordering. The same workflow can also revert changes when products are back in stock.



## Trigger

- Product inventory changes

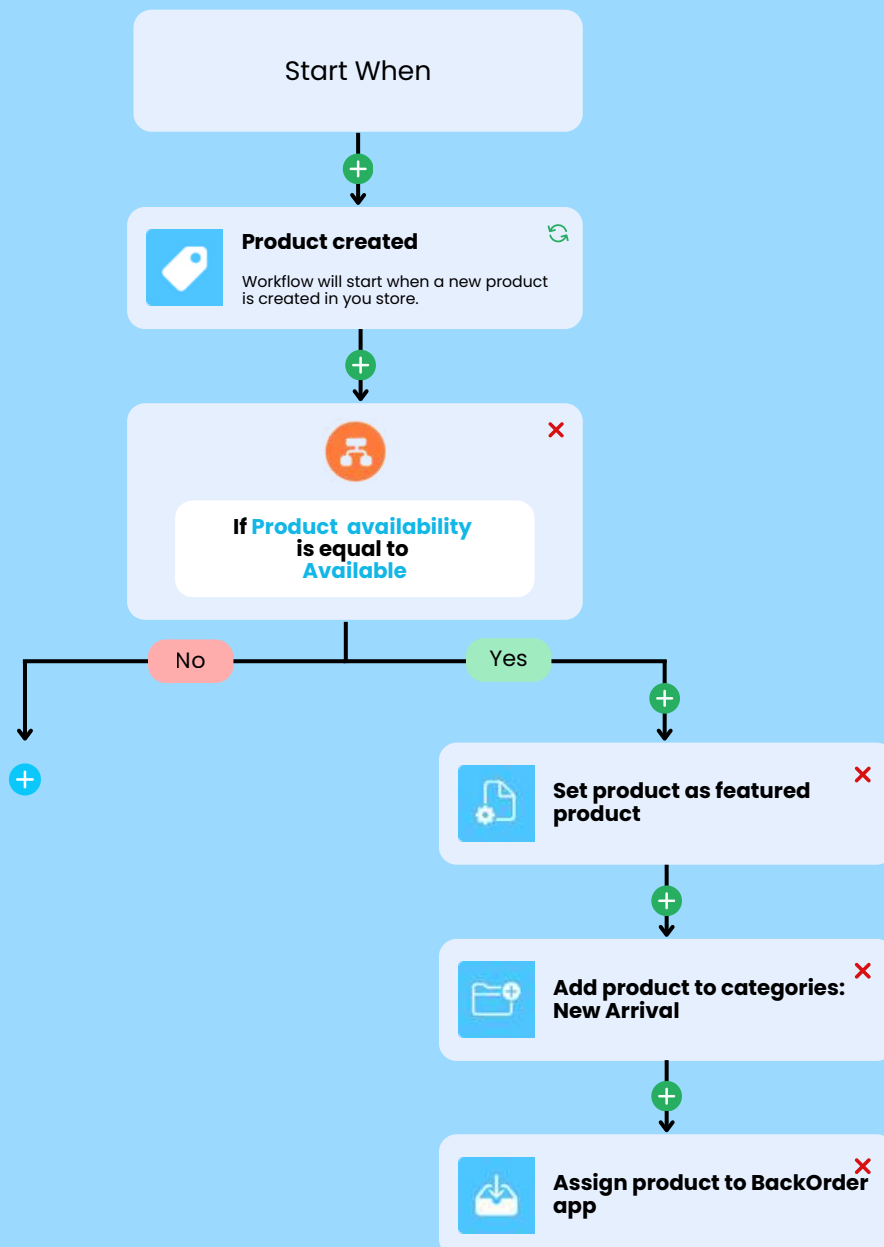
## Action

- Change product availability
- Change product sort order
- Notify team members



# Feature & Categorize Newly Created Products

- **Use case description:** Automatically update and promote new products by marking them as featured and adding them to the "New Arrival" category, ensuring timely storefront promotion. Additional actions include adding custom fields and updating identifiers for accurate inventory management.



## Trigger

- Product created

## Action

- Set products as featured product
- Add product to categories
- Assign product to app



## USE CASES

# Customer Management

# Segment Customers based on Demographic

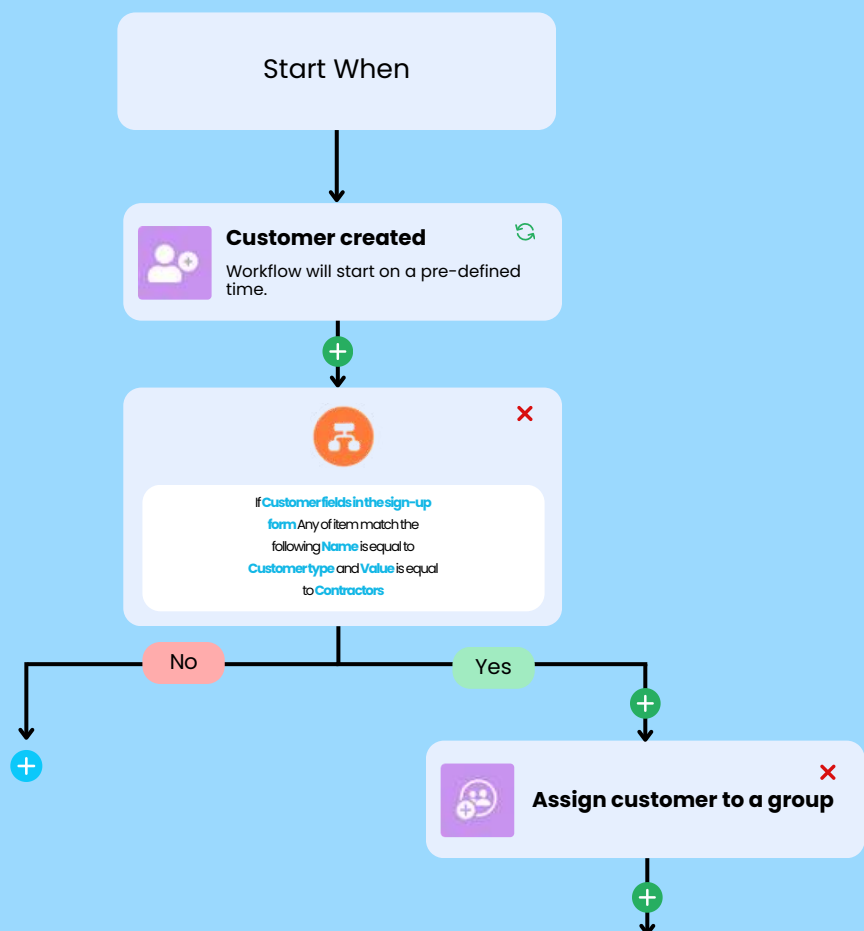
- **Use case description:** When a new customer is created, the system checks their details against predefined conditions. If the condition is met, the customer is automatically assigned to a specific group. This workflow can also segment customers based on their email domain, location, or specific occupations.

## Trigger

- Customer created

## Action

- Assign customer to a group



# Segment Customers based on Buying Behaviors

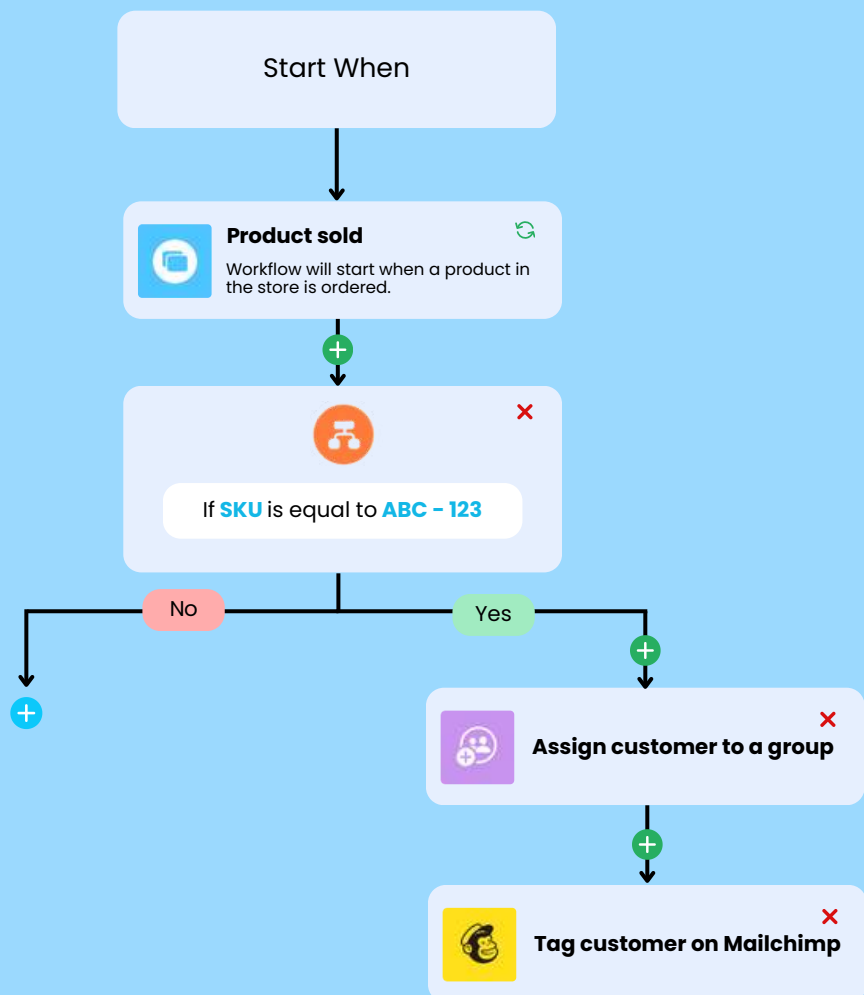
- **Use case description:** Atom8 monitors customer behavior on the storefront and automatically segments them into appropriate groups. By evaluating predefined conditions such as buying preferences, activities, total spending, and order history, the system ensures customers are accurately categorized

## Trigger

- Product sold

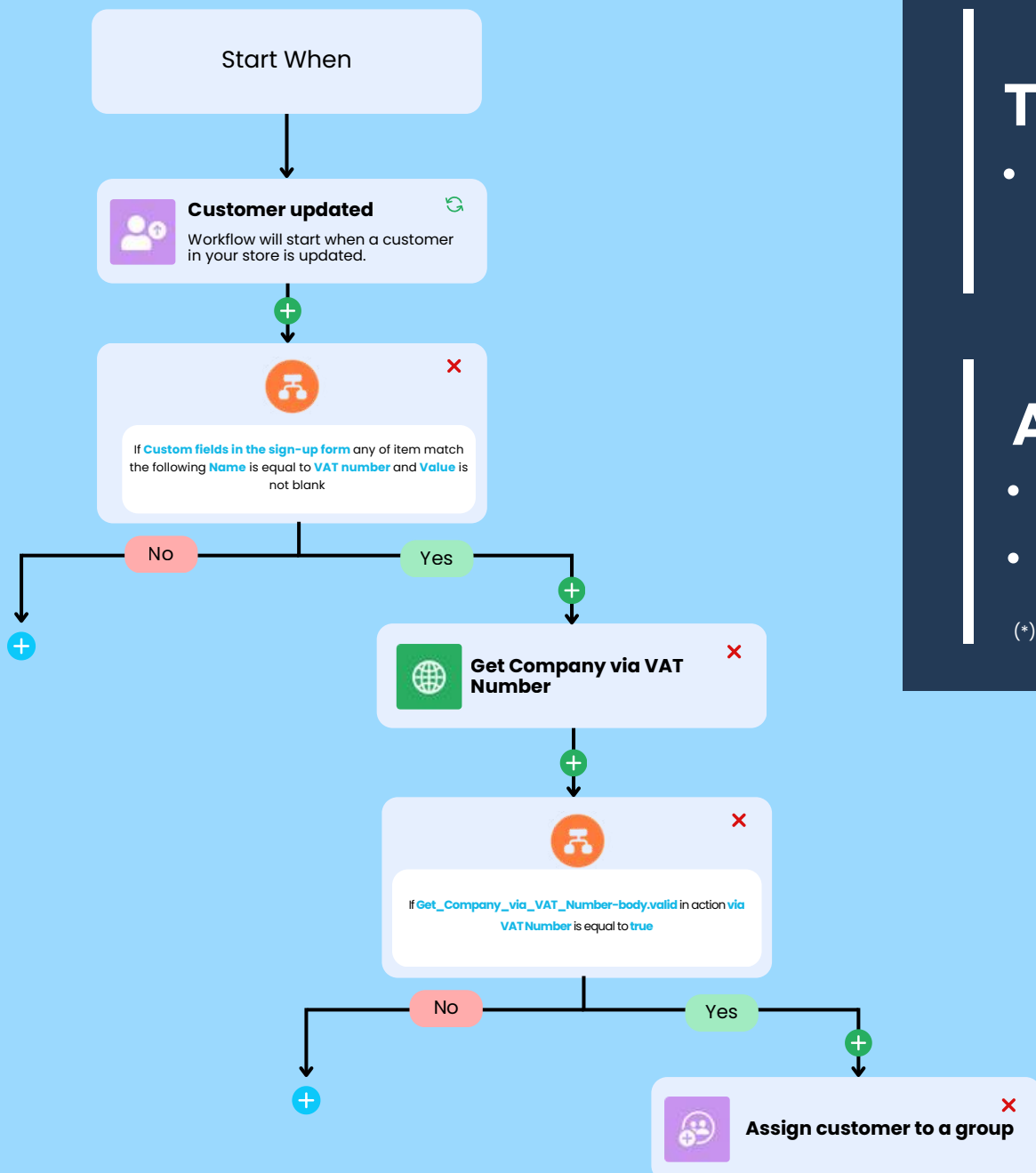
## Action

- Assign customer to a group
- Tag customer on Mailchimp



# Validate Customer's VAT Number

- **Use case description:** Validate customers' VAT numbers that customers input into the Sign-up form's Custom Field and assign customers to their Tax Exempt groups. This workflow is popular amongst European Merchants due to their EU Tax Regulations.
  - Check the VAT number via API from [vatcomply.com](https://vatcomply.com)
  - Check the Country code via [countrycode.org](https://countrycode.org)



## Trigger

- Customer created

## Action

- Get company via VAT number (\*)
- Assign customer to a group

(\*) Contact GRITGLOBAL for support.



# Reward Customers with High Total Spending

- **Use case description:** The system automates personalized rewards for customers with significant overall spending. By identifying high-value customers, it triggers tailored actions such as exclusive discounts, loyalty points, or special offers. This approach enhances customer retention and fosters long-term brand loyalty.

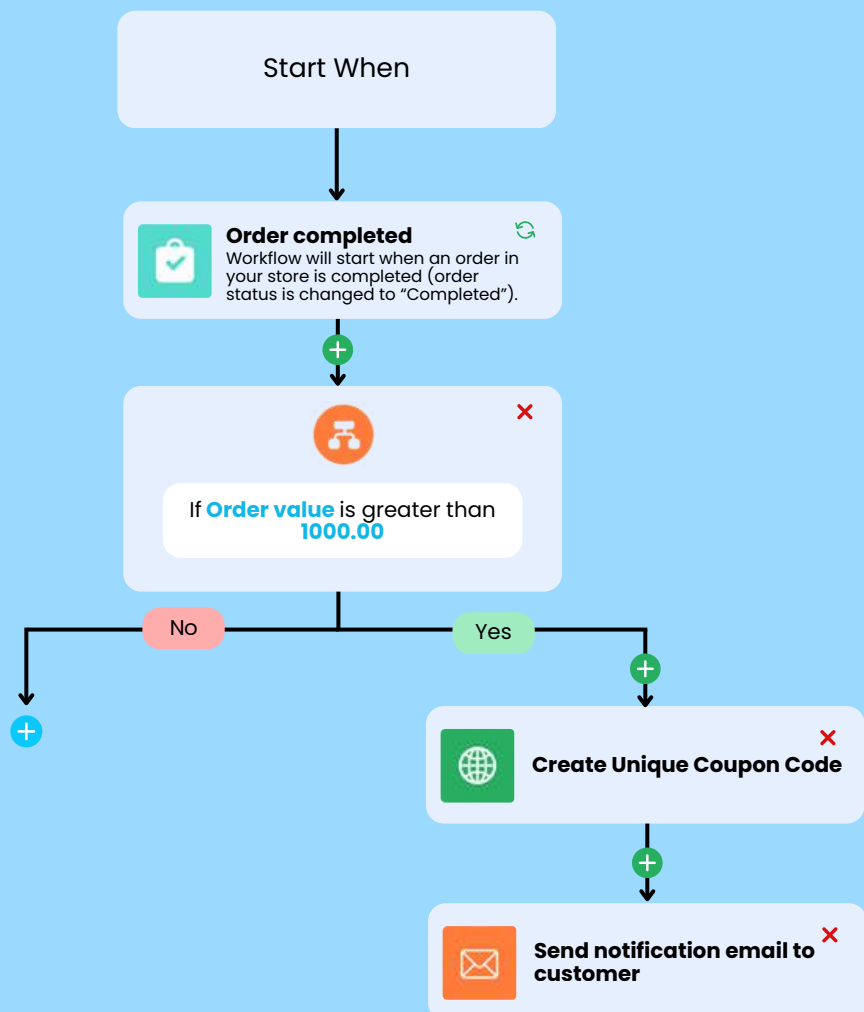
## Trigger

- Order completed

## Action

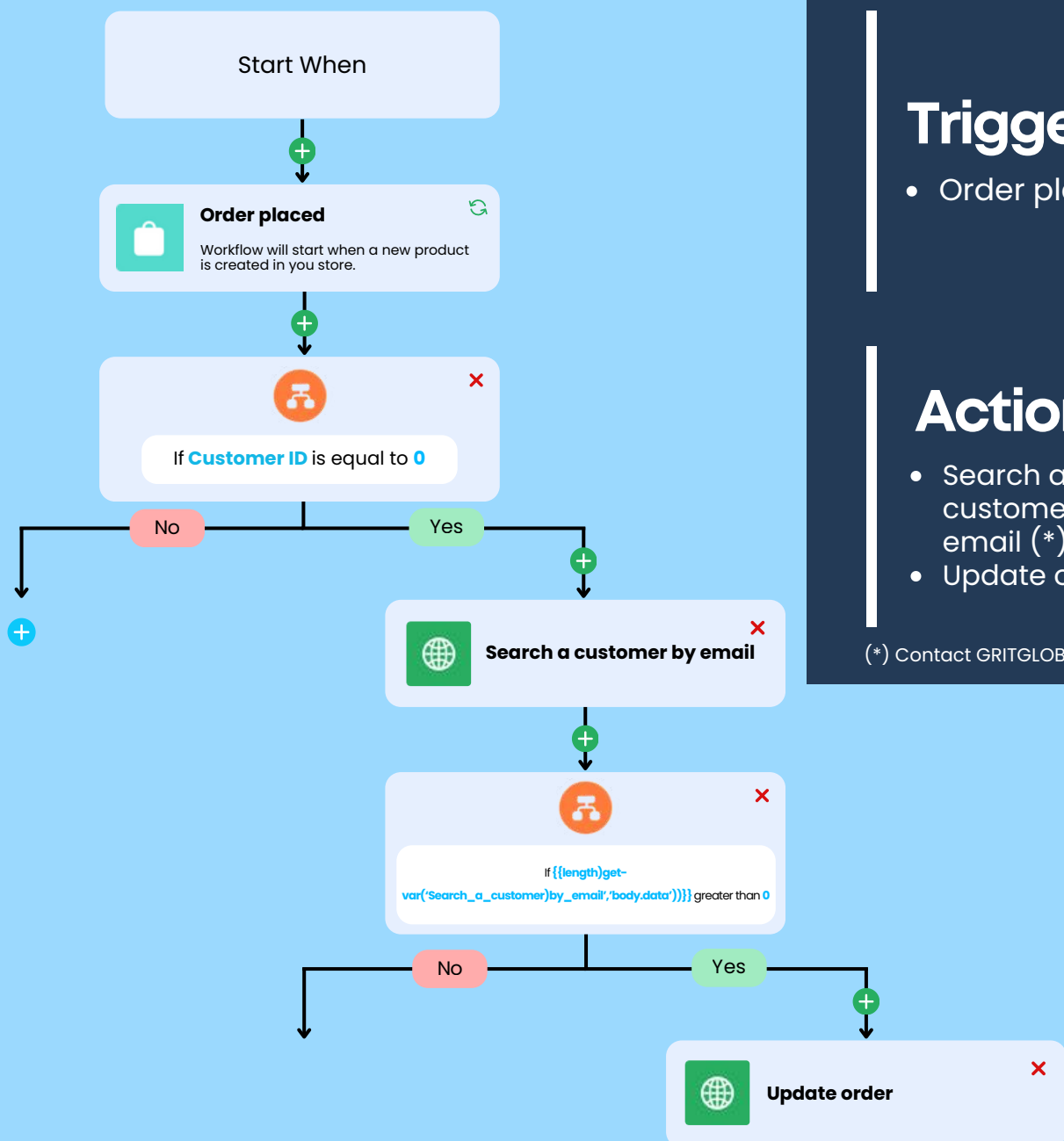
- Create coupon code (\*)
- Send notification email

(\*) Contact GRITGLOBAL for support. [→](#)



# Update Guest Order with Customer's ID

- **Use case description:** Automatically update guest orders by assigning a matching Customer ID if one exists. This workflow ensures accurate customer records, streamlines order management, and enhances the customer experience by linking guest orders to registered accounts when possible.



## Trigger

- Order placed

## Action

- Search a customer by email (\*)
- Update order (\*)

(\*) Contact GRITGLOBAL for support.



## USE CASES

# Order Management

# Change Order Status for Abnormal Orders

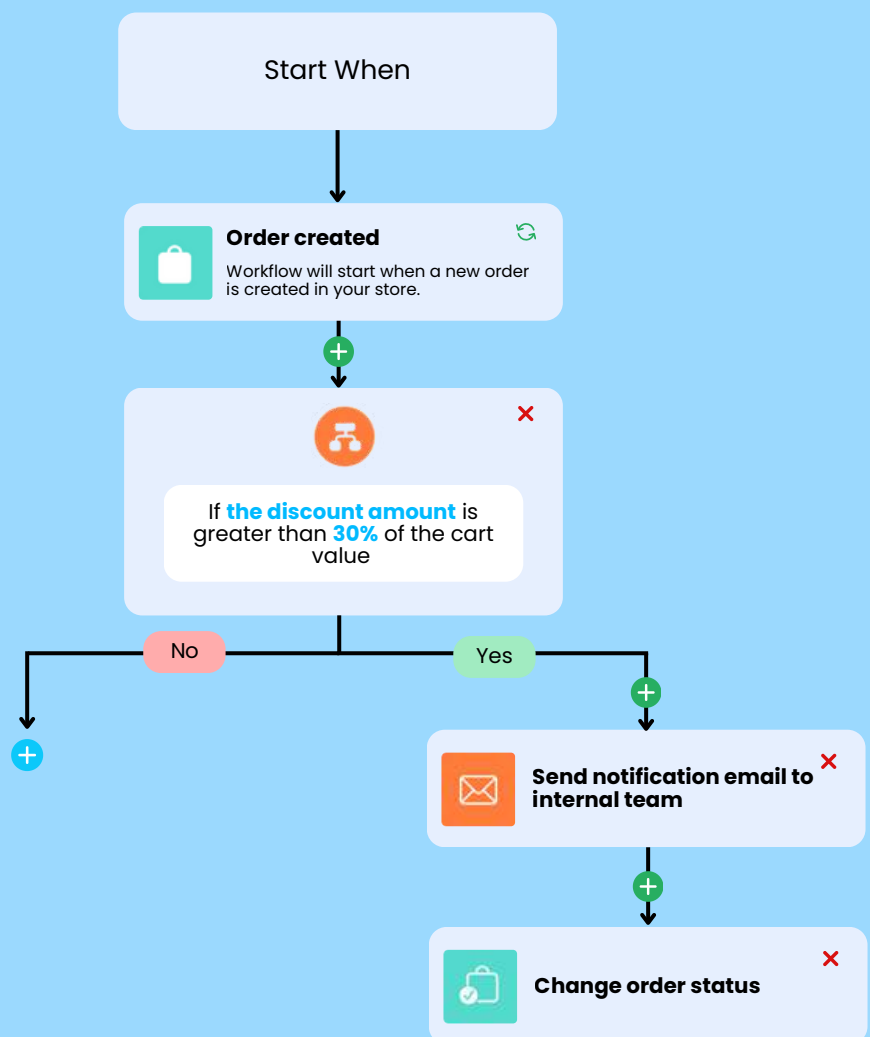
- **Use case description:** Flag abnormal orders based on criteria like large amounts, fraud risks, or specific sales channels. Update the order status to hold, delaying fulfillment until verified, ensuring prompt action and secure operations.

## Trigger

- Order created

## Action

- Send notification email
- Change order status





# Tag Orders based on Predefined Criteria (ShipStation)

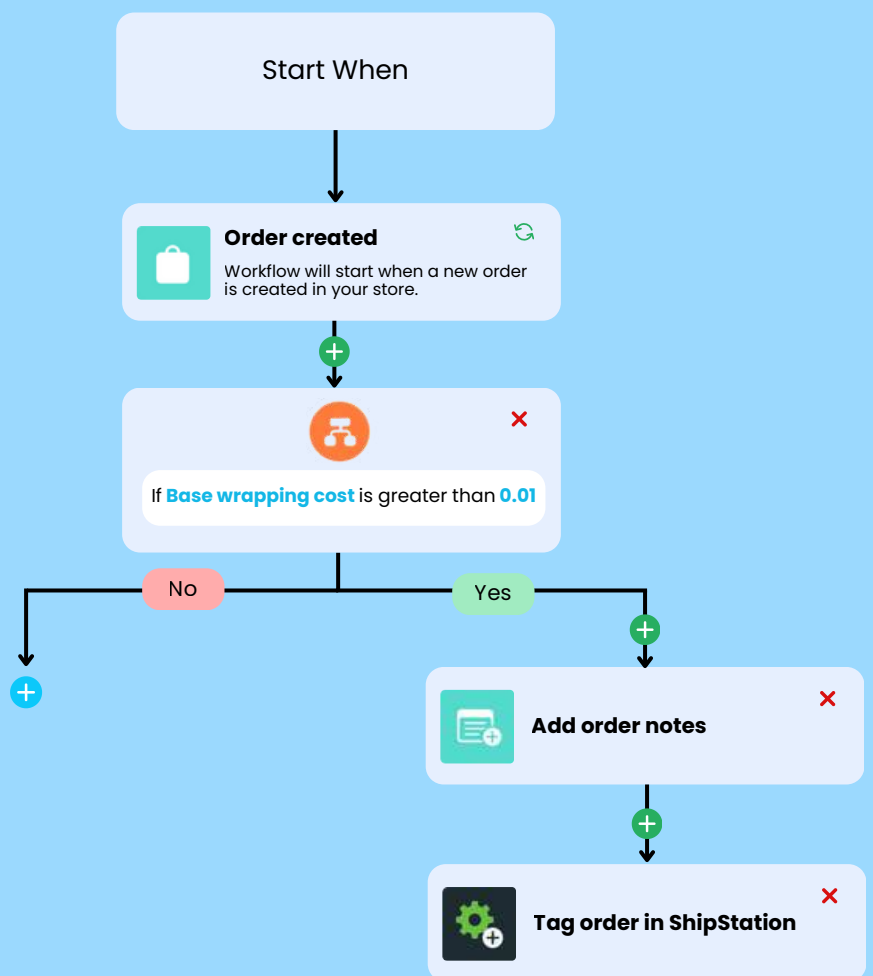
- **Use case description:** Automatically apply tags to orders in ShipStation based on predefined criteria, such as order value, shipping method, or customer type. It can also be used for cases like customer-first orders, specific shipping methods, or when a customer purchases specific SKUs.

## Trigger

- Order created

## Action

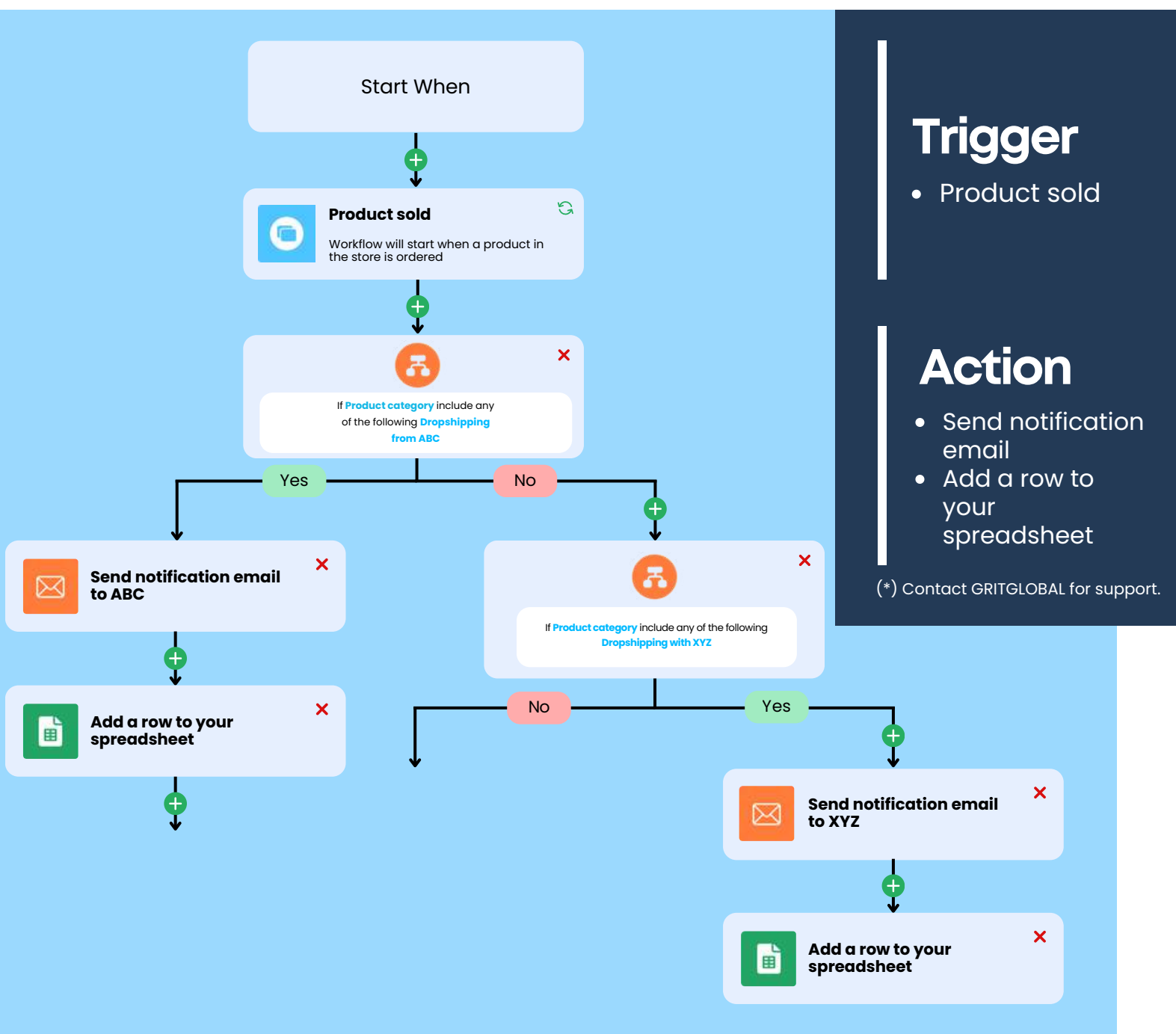
- Add order notes
- Tag order in ShipStation





# Forward Order Details to Suppliers/ Manufacturers

- **Use case description:** Automatically send order details to the correct supplier or manufacturer based on specific SKUs, streamlining the dropshipping process. This workflow can also sync orders with OMS/ERP systems or generate Google Sheets reports for product performance analysis.



# Capture Payment Upon Order Shipment

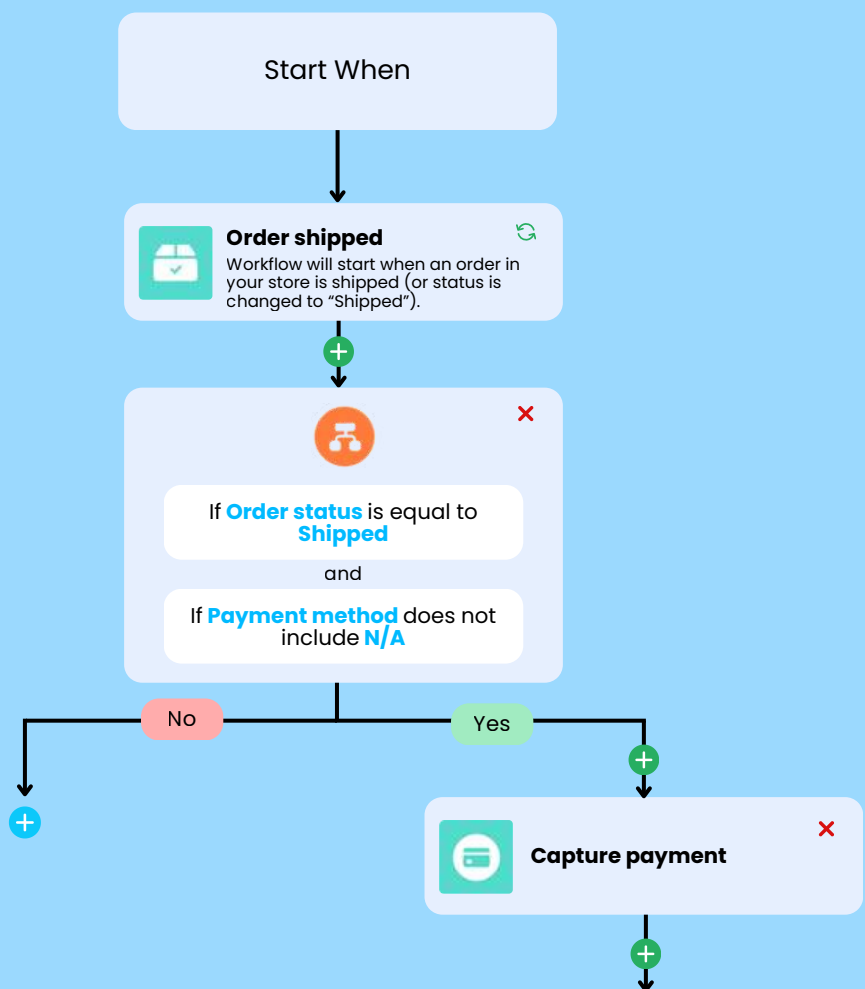
- **Use case description:** Capture payments automatically for orders marked as "Shipped," ensuring payments are processed only after shipment and valid payment conditions are met.

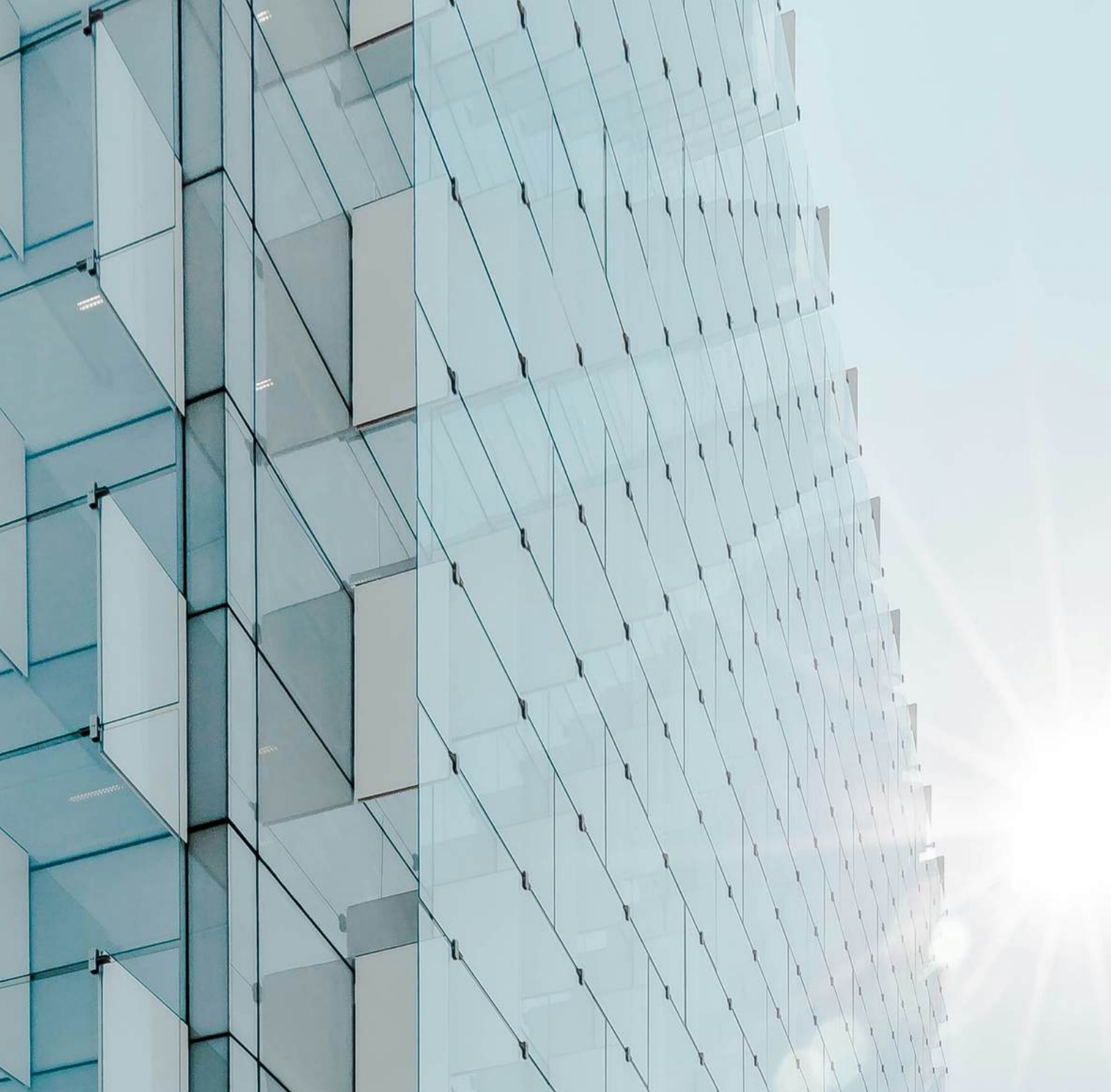
## Trigger

- Order shipped

## Action

- Capture payment





## USE CASES

# Internal Communication

# Notify Internal Team for Human Verification

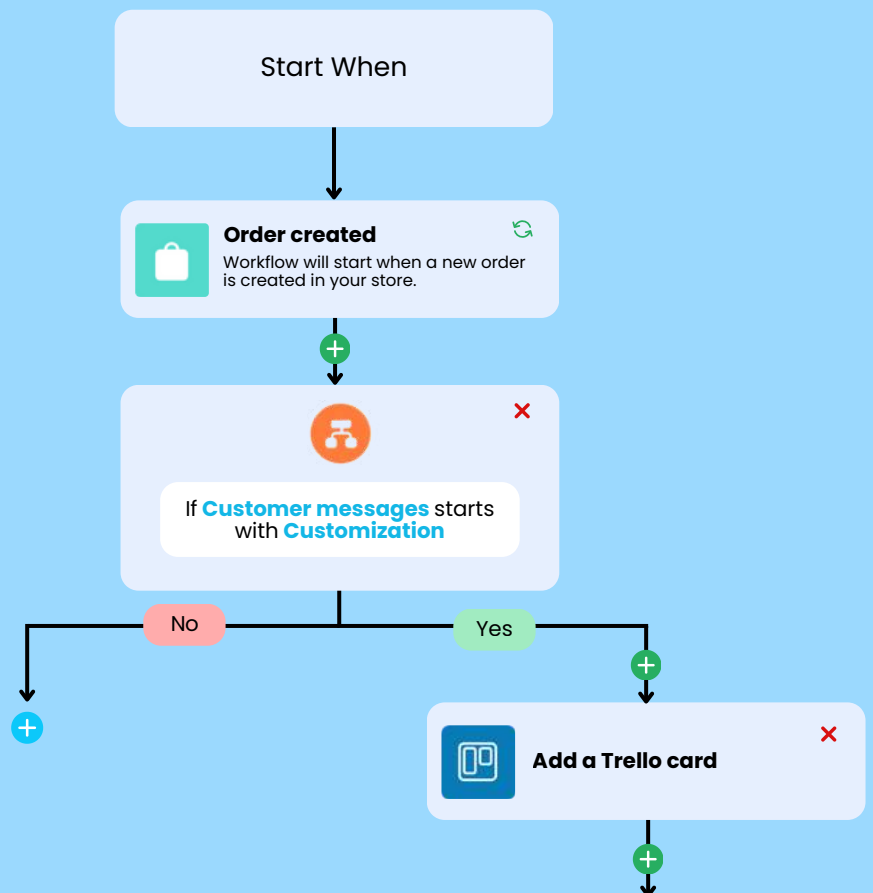
- **Use case description:** This workflow automates alerts for events like fraud detection, large orders, low stock, or custom requests, ensuring timely team communication via Slack, Trello, or email. It covers scenarios such as manual verification, delayed fulfillment, specific SKUs, and gift-wrapping requests, etc.

## Trigger

- Order created

## Action

- Add a Trello card







## USE CASES

# 3rd Party Platform Integration

With "Send HTTP Request" and "HTTP Trigger," ConnectPOS Automation Software extends its capabilities beyond BigCommerce for seamless external integration.



# Integrate with Salesforce

- **Use case description:** This integration acts as a connector between your store and Salesforce, automatically syncing all order information to Salesforce. It ensures seamless data flow between the two platforms, enabling efficient order management and customer relationship tracking.

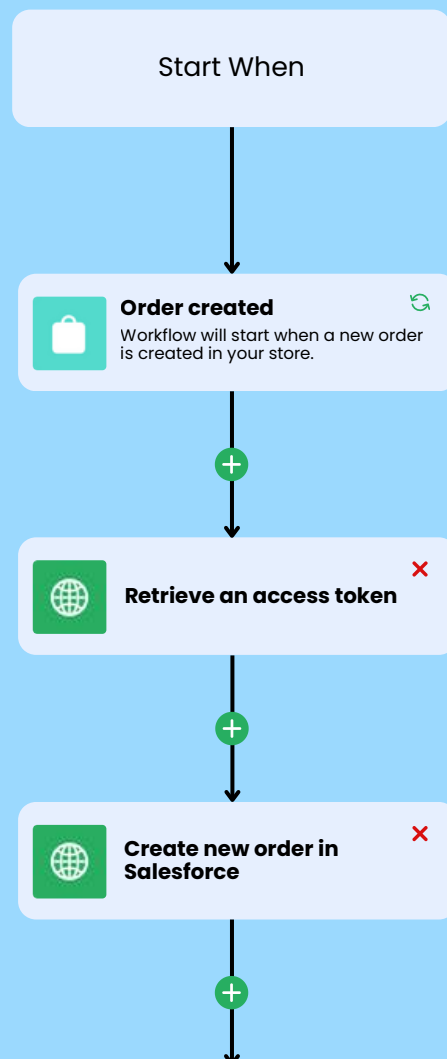
## Trigger

- Order created

## Action

- Retrieve an access token
- Create new order in Salesforce (\* HTTP Request)

(\*) Contact GRITGLOBAL for support. [→](#)



# Integrate with Email Marketing Tools

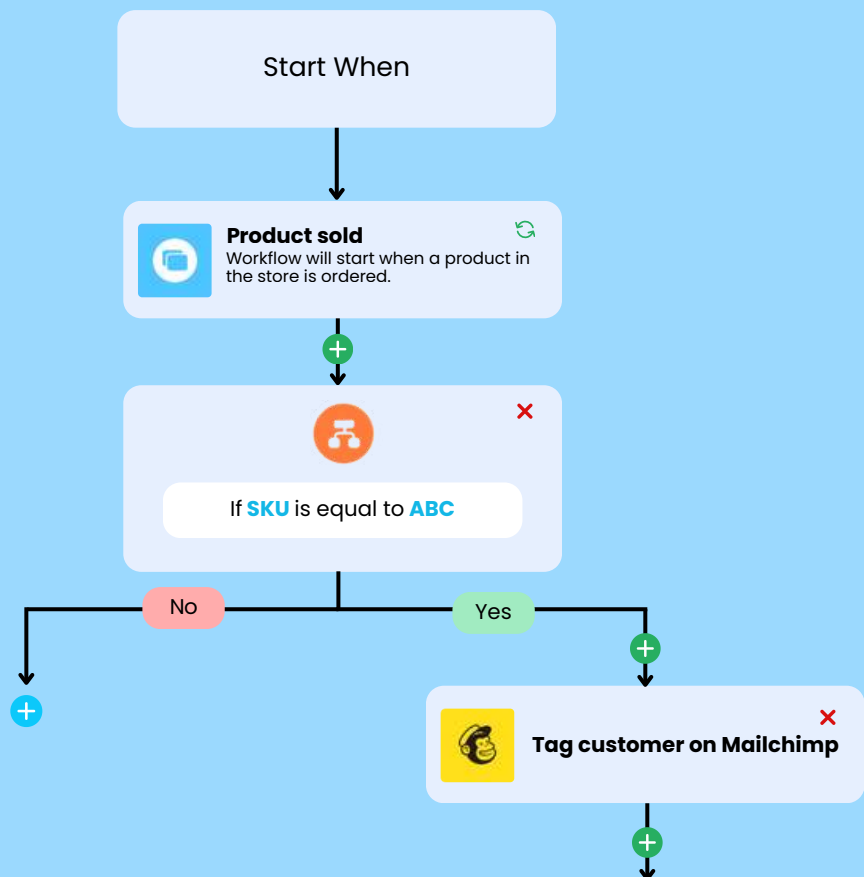
- **Use case description:** This integration syncs customer behavior from your storefront with your email marketing tool, enabling segmentation and personalized communication for actions like cart abandonment, high-value purchases, first orders, and delayed payments.

## Trigger

- Product sold

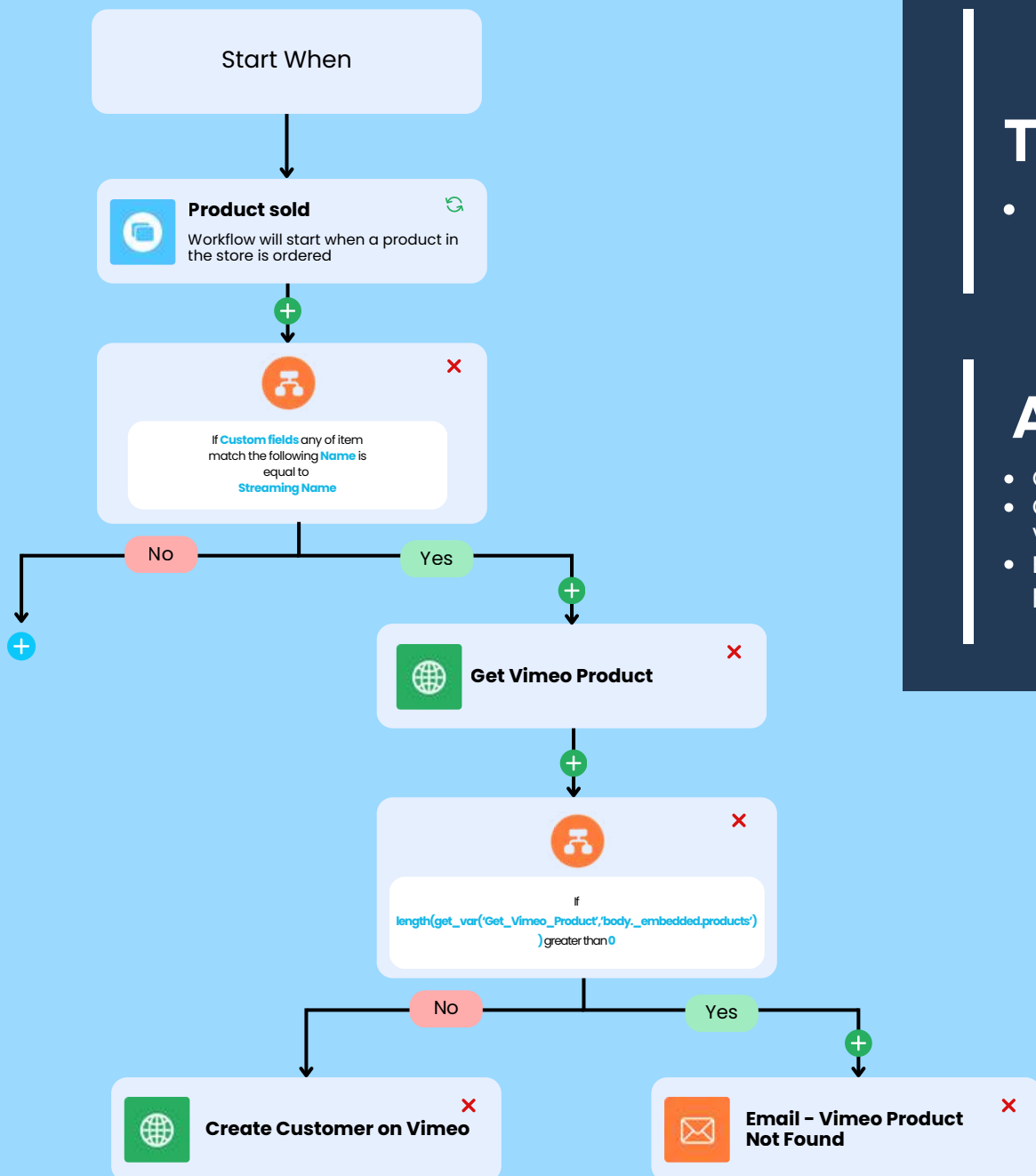
## Action

- Tag customer on Mailchimp



# Integrate with Vimeo

- **Use case description:** When a product is sold, the workflow checks specific conditions and retrieves related data from Vimeo. Based on the results, the system either triggers appropriate actions, such as sending notifications or creating new records on Vimeo. This integration ensures efficient data synchronization and automated management of product and customer information.



## Trigger

- Product sold

## Action

- Get Vimeo product
- Create customer on Vimeo
- Email - Vimeo product found

# Integrate with ShipStation

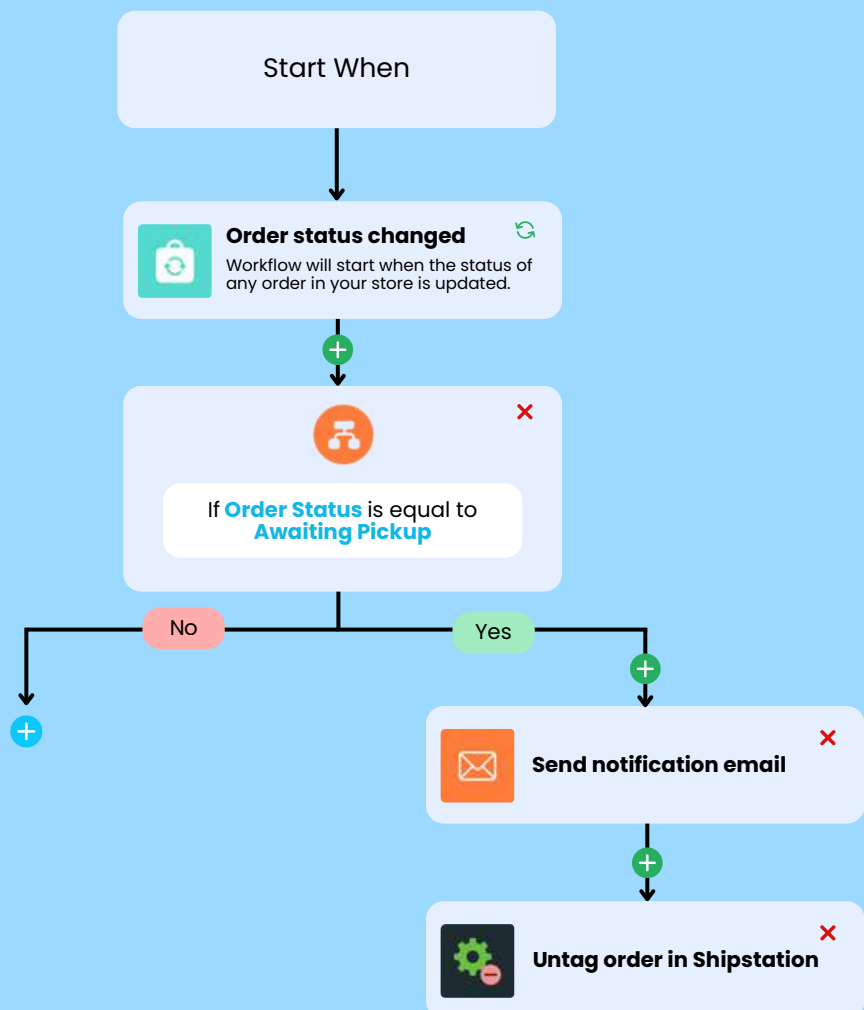
- **Use case description:** This integration automates workflows based on order status changes, enabling tasks such as sending notifications, updating order tags, and ensuring accurate status management in ShipStation. It improves operational efficiency, enhances communication, and reduces manual intervention in the order fulfillment process.

## Trigger

- Order status changed

## Action

- Send notification email
- Untag order in Shipstation



# Integrate with Google Sheets

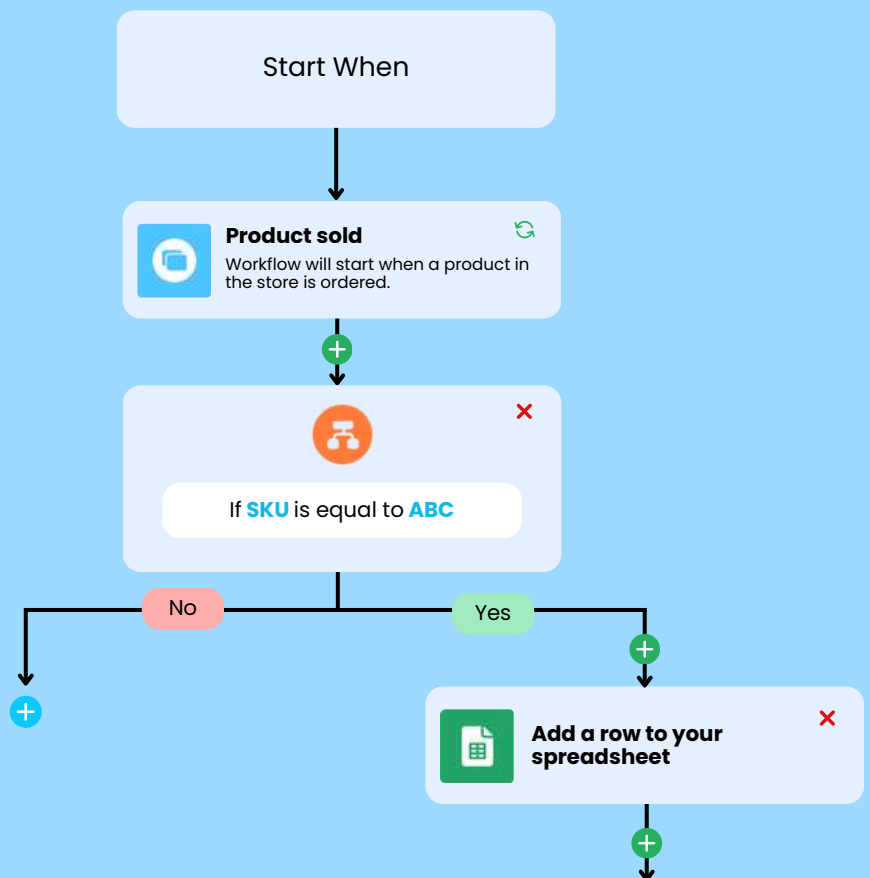
- **Use case description:** Automate adding and updating your online store's records on Google Sheets saves time, reduces manual errors, and provides real-time updates for easy tracking and analysis. For instance, workflows can automatically add data based on predefined conditions for new products, keeping your operations streamlined and organized.

## Trigger

- Product sold

## Action

- Add a row to your spreadsheet







# THANKS