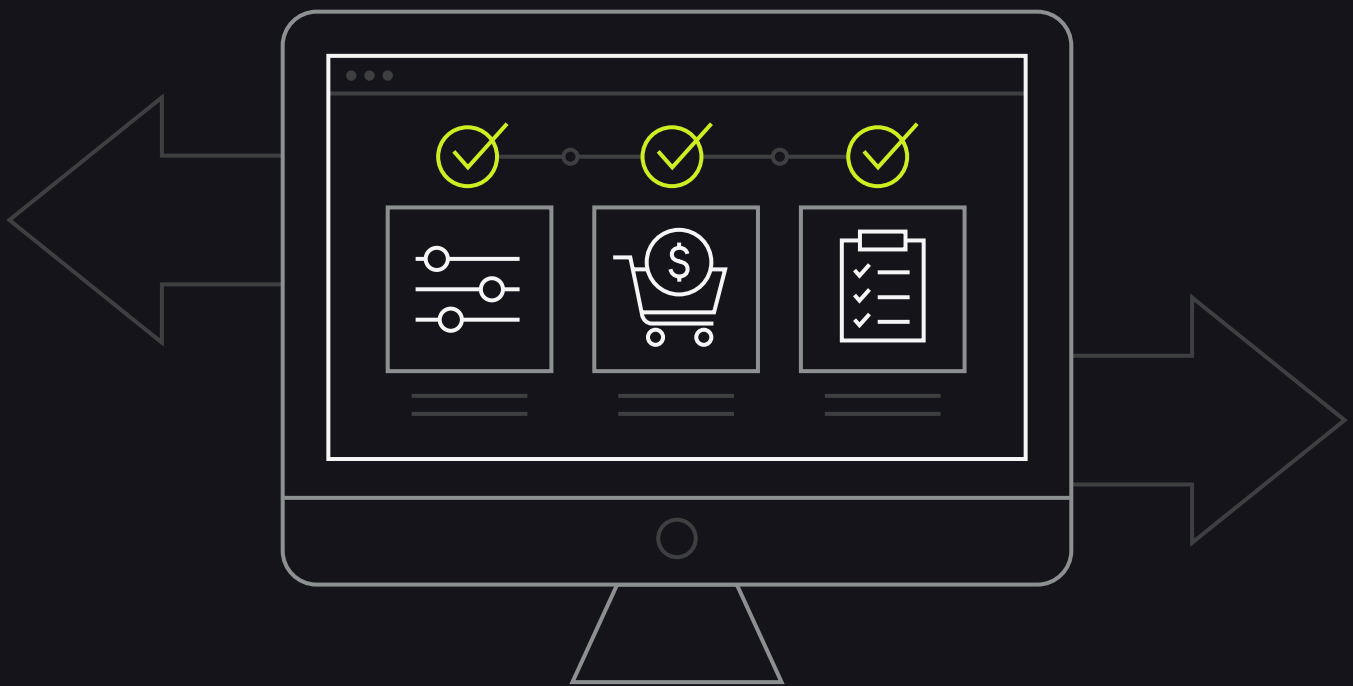


B2B Ecommerce Platform Feature Checklist



Product overview

Last modified
04/2022

Contents

B2B ecommerce platforms	3
How to pick the best platform for your business	5
Customization and personalization	6
Self-serve features	6
B2B pricing features	8
B2B checkout features	8
B2B payment features	9
Product information features	9
B2B customer relationship management (CRM) features	9
Marketing and promotional features	10
Integrations and partners	11
Inventory and order management features	11
Additional platform considerations	12
Ease of use	12
Flexibility	12
Scalability	13
Security and reliability	13
Selling B2B with Shopify Plus	14

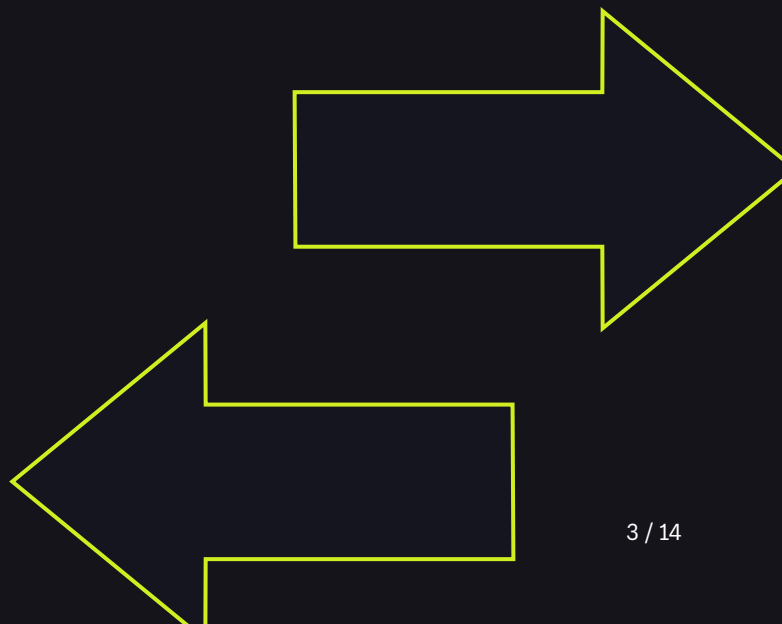
B2B ecommerce platforms

While many people think a B2B ecommerce platform is just a tool to list products and accept payments, a true one is more than that. It acts as a command center where you control everything from sales to commerce operations, whether it's for B2B and wholesale customers or a D2C website.



It's fair to say that having the wholesale portal will save us the equivalent of one employee a year. That's \$50,000 to \$60,000 a year and covers the cost of Shopify Plus several times over.

Paul Hodge
CEO, Laird Superfood



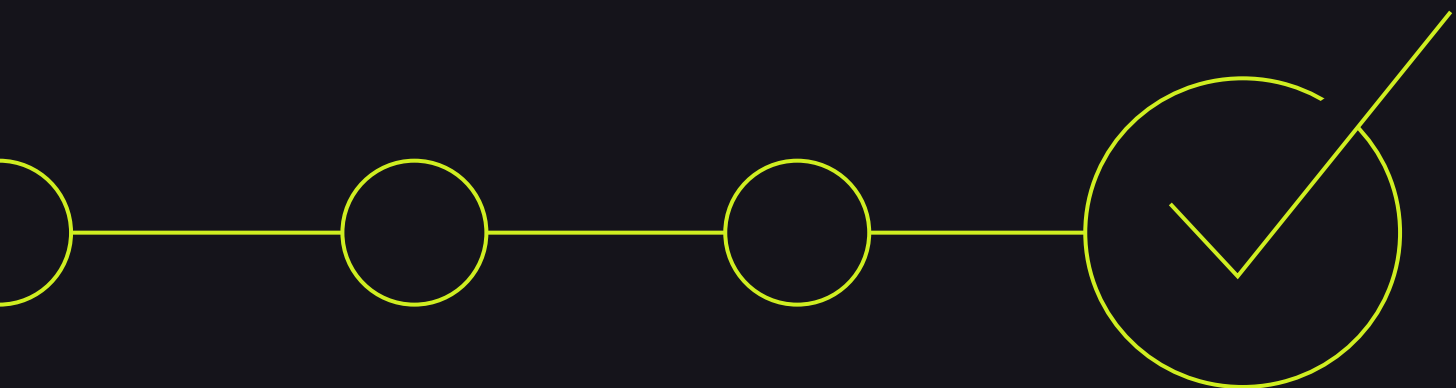
For example, a B2B ecommerce website lets you:

- Provide personalized sales and marketing experiences across sales channels and devices
- Help customers find products with onsite search and customized navigation
- Integrate customer data from your ERP or CRM through reliable APIs
- Offer flexible payment options with different payment providers and manual invoicing
- Optimize for conversion with powerful checkout promotions

If you're just getting started with wholesale, a B2B ecommerce solution drives sales by helping you:

- Create custom pricing and discounts for specific customer segments
- Automate and review new buyer signups
- Allow B2B customers to buy, track, and reorder products easily
- Sync inventory, purchase orders, and customers with an existing ecommerce store or third-party software

In the end, a solid B2B ecommerce platform allows you to manage everything from one place, with endless opportunities for growth.



How to pick the best platform for your business

Ready to pick your business-to-business (B2B) ecommerce platform? Use this checklist to review the essential B2B ecommerce features across 10 categories. Reference this list when researching solutions and choose the platform that will allow you to delight your B2B customers day in and day out.

B2B capabilities "essential" to online shopping

As reported by Forrester, MarketingProfs, and SAP Hybris



62%

Enhanced search



56%

Rating and reviews



54%

Personalized recommendations



51%

Promotions and specials



41%

Mobile-optimized website

Customization and personalization

- ☐ B2B storefront with features designed to enable B2B transactions, such as customer-specific pricing and products
- ☐ The option to define custom pricing and discounts for individual customers or customer groups
- ☐ The ability to set up shipping and freight rates based on customers' location and order size
- ☐ Access to previously viewed products and previous orders for each customer
- ☐ View of agreed-upon payment methods and terms for each customer
- ☐ The ability to set up quick access to important pages, categories, and/or brands based on previous orders
- ☐ Store themes specifically optimized for the B2B ecommerce experience
- ☐ Page templates for a frequently asked questions (FAQs), privacy policy, terms of use, wholesale program details, and more
- ☐ Personalized product offerings for different customers or customer groups

Self-serve features

- ☐ The ability for customers to browse, order, and reorder products from your website 24/7
- ☐ Real-time inventory and prices
- ☐ Advanced product search and filtering options based on comprehensive product attributes
- ☐ A product comparison engine for easy decision making
- ☐ The ability to request a quote for products and to turn a quote into an order
- ☐ Easy access to previous quotes and orders
- ☐ The ability to create and save product lists
- ☐ Easy reordering
- ☐ Detailed order tracking
- ☐ Bulk ordering

A note on product search

Enhancing your onsite search for B2B customers is equally important and helps to streamline the sales process — empowering your sales reps to work in a more consultative, rather than transactional role.



You know you are running a modern sales team when selling feels more like the relationship between a doctor and a patient and less like a relationship between a salesperson and a prospect. It's no longer about interrupting, pitching and closing. It is about listening, diagnosing and prescribing.

Mark Roberge

Advisor and former Chief Revenue Officer, Hubspot

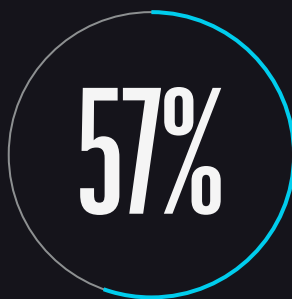
How to pick the best platform for your business

Shifting B2B preferences

The ride of self-service B2B ecommerce



**B2B buyers prefer
to self-educate**



**Through a purchase
before they reach out**



**Prefer self-service to
rendering rather a sales rep**

B2B pricing features

- ☐ Custom pricing based on:
 - ☐ The specific customer or customer group
 - ☐ Products or variants in cart
 - ☐ Quantities of products or variants purchased
 - ☐ Country and region of the customer
- ☐ Personalized discounts, currencies, exchange rates, and tax information
- ☐ Minimum product quantities or order value
- ☐ Maximum product quantities or order value
- ☐ Multiple product quantities
- ☐ The ability to show prices with or without tax, depending on whether the customer should be charged tax

B2B checkout features

- ☐ View of customer-specific payment terms and options
- ☐ Easy access to wholesale prices and discounts
- ☐ Access to vaulted cards for faster checkout
- ☐ Location-specific information for shipping, tax, and currencies
- ☐ Product recommendations based on previous orders for easy reordering
- ☐ The option to review and approve customer orders
- ☐ The ability to show or hide payment methods based on specific customers or customer groups, brands, products, categories, and order value

B2B payment features

- ☐ The option to offer payment terms to customers
- ☐ Automated tracking of outstanding payments on orders
- ☐ The ability to charge vaulted credit cards at checkout and on a draft order
- ☐ Automated payment reminders when payments are due
- ☐ Easy invoice management

Product information features

- ☐ The ability to list and categorize all product features
- ☐ Space to upload high-quality product images, videos, and 360 imagery
- ☐ The option to customize how product descriptions are displayed (e.g., different tabs or sections and their layout)
- ☐ Space to add custom product information, like detailed dimensions and style specifications


B2B customer relationship management (CRM) features

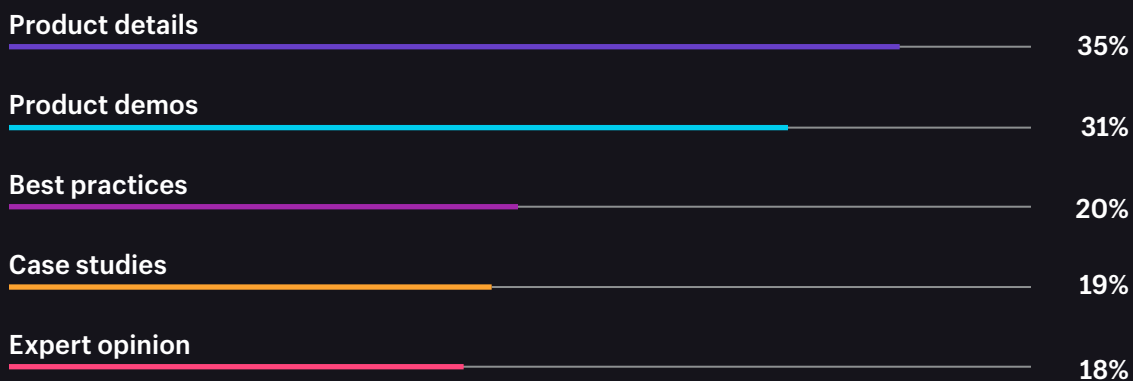
- ☐ Detailed customer profiles that support a non-linear, complex buying process
- ☐ Dedicated fields for:
 - ☐ Company locations
 - ☐ Payment terms
 - ☐ Tax ID
 - ☐ Price lists and product catalogs
 - ☐ Customer lifetime value
 - ☐ Previous transactions
 - ☐ Multiple contacts within the same company
 - ☐ Cross-channel touchpoints and interactions
 - ☐ Product preferences and needs
 - ☐ Marketing and communication preferences
 - ☐ User roles and permissions for different contacts and departments within the company

Marketing and promotional features

- ☐ SEO optimization through meta titles, descriptions, URLs, XML maps, and more
- ☐ Built-in email capabilities for sending emails to potential and existing customers, including promotions, abandoned cart recovery, and transactional emails
- ☐ Promotion capabilities like coupons, discounts, free shipping offers, and order discounts
- ☐ Content management system (CMS) for managing articles, videos, product images, and other media formats
- ☐ Targeting capabilities to offer promotions to specific customers and groups based on store activity and previous orders

Most effective B2B sales content

98%  of B2B buyers do online research and content matters



Source: LinkedIn's Rethinking the B2B Buyer's Journey

Integrations and partners

- ☐ Integrations with compatible ecommerce software: product information management (PIM), enterprise resource planning (ERP), third-party logistics (3PL), and more
- ☐ Integrations with other relevant software for analytics, accounting, paid advertising, and more
- ☐ Shipping and freight integrations with carriers in different countries
- ☐ Access to a network of partners—including agencies and freelancers—who know the B2B ecommerce platform in and out and offer relevant sales, marketing, store setup, development, branding, and content services

Inventory and order management features

- ☐ Shared customer, product, and inventory data for all your storefronts, with a single view of inventory across all channels
- ☐ Order management for all storefronts from one interface
- ☐ Order management for orders from all channels, including online store, phone orders, retail, and more
- ☐ Inventory levels for any number of warehouses in one place, with automatic stock level updates for your customers

Additional platform considerations

It's not just about ecommerce features. Here are additional factors to consider when narrowing down your list of B2B ecommerce solutions.

Ease of use

Many B2B-oriented software products are stuck in the past. They look outdated and take ages to deploy, often relying on an army of developers. It will slow you down in the beginning and every time you want to upgrade your website.

Ditch the legacy software and opt for a solution that's easy to use and supports quick deployment. This can include templates for custom pages on your website or a drag-and-drop editor so you can tweak sections. Navigating the platform should be straightforward and intuitive.

Most importantly, it shouldn't take weeks or months to make changes your customers need right now.

Flexibility

Let's say you want your vendor signup forms to have five fields, but the platform forces you to have at least seven. Or you want to offer a wide range of payment methods, but you can only offer two.

Platform limitations will force you to make compromises and tradeoffs. They'll shape the customer experiences you create. How will they influence new visitors who want to buy from you for the first time? Will they discourage existing ones from ordering from you again?

Take note of the customizations you need and look for a platform with features, integrations, and support that match them.

Scalability

If you're already serving B2B customers in some capacity, your ecommerce platform shouldn't just match your needs right now. It should easily grow and expand just as your business does.

Let's say your ecommerce store currently sells to 100 business customers. Will the same platform work for you if that number jumps to 500? What about 2,000?

Without scalability built right in, you'll run into a wall as you grow. You'll be forced to change platforms, which will take your precious time away from driving your business forward. Plan to scale right from the start to avoid this.

Security and reliability

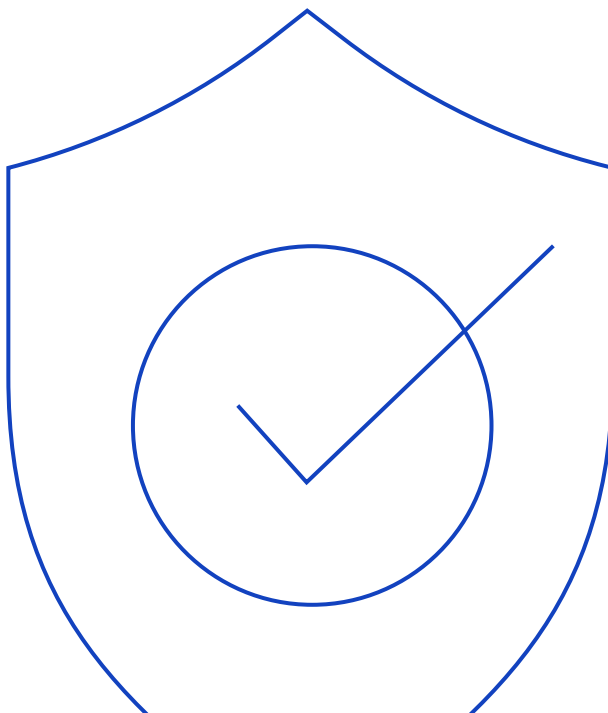
Your business and customer data need to be safe and secure, but not by adding more to your plate. It needs to be your chosen platform's default.

Does the ecommerce platform have a secure network and regularly test it? Does it protect cardholder data? Is there an information security policy in place?

Pay attention to compliance standards including:

- PCI (a payments security standard)
- GDPR (a legal framework for protecting personal data)
- ISO 27001 (an international standard for information security)
- SOC 2 (a compliance standard for service organizations)

A recent report uncovered that retail suffers the most ransomware attacks among more than a dozen industries. Choose a platform that will protect you from security challenges.



Selling B2B with Shopify Plus

B2B ecommerce is a great way to find new customers and increase sales for your business. The right platform will streamline your back end, empower your customers to use self-serve tools, automate manual tasks, and customize every customer touchpoint.

Whether it's building an online storefront, improving inventory management, or streamlining your recording process, the right B2B ecommerce platform can help you get there.



The greatest myth around wholesale ecommerce is that it's difficult to get your sales channel up and running. Shopify Plus is a fast and convenient way to get selling and give your customers the optimal portal to streamline their ordering process.”

Pierre Verrier

Director of Design and Development, Noticed

See how brands are growing 120% year over year—while managing their B2B and DTC businesses from the same location—with Shopify Plus.

[Contact us](#)