



# B2B Ecommerce Platform Feature Checklist

A 10-point checklist for choosing the right ecommerce platform for your B2B business

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# A 10-point checklist for choosing the right B2B ecommerce platform

If you downloaded this checklist, you've decided you're ready to expand into B2B ecommerce. The next step then is to understand exactly what features your ecommerce platform should offer in order to run a successful online wholesale business.

This 10-point B2B checklist will help you ensure alignment between your business requirements and platform capabilities, and streamline your vendor evaluation process.

# 1. Personalization and customization

Personalized buying experiences are no longer a nice-to-have—they're imperative for B2B customers. Providing customers with tailored information, localized interfaces, and warm transitions across channels have become key differentiators.

The good news? Brands that excel at personalization will be rewarded with higher average order values and deeper customer relationships. Choose a platform that allows you to:

- Create customized buying experiences for B2B buyers, with customer-specific catalogs and pricing, payment terms, and payment methods
- Implement custom checkout logic around payment and deliveries, such as shipping rates based on customer group or order size
- Set rules for product purchasing (minimums, maximums, increments) on a per customer basis
- Localize language and currency for international customers
- Give your customers access to their order history and account information
- Customize branding and design across your entire website
- Add custom fields to company profile pages to keep track of key customer information
- Edit and customize store themes and out-of-the-box email templates
- Use page templates for a frequently asked questions (FAQs), privacy policy, terms of use, wholesale program details, and more

# 2. Self-serve purchasing, 24/7

Most customers prefer self-serve purchasing so they can place orders and manage their account—24/7. Not only does always-on service benefit the customer, it also frees up your teams to focus on more strategic initiatives.

Customers should be able to:

- Browse and order products from your website for one or more company locations (based on their company setup and buyer permissions)
- See up-to-date stock and inventory information
- Prepopulate checkout with a customer's negotiated payment terms and payment methods, and designated address
- Request a quote online
- Vault a credit card for future payments
- Manage their own account information (based on permission level)
- Easily place reorders
- Access detailed order tracking and order history for one or more company locations (based on their company setup and buyer permissions)
- Place bulk orders via variant grid view (depending on products) or quick order lists
- Pay for orders as payments become due or overdue
- Conduct advanced product search and filtering based on comprehensive product attributes



**The self-serve experience for our B2B customers is super exciting. It allows us to scale because our customers will be able to order and reorder as many times as they want without the assistance of our internal team. It's not something we're seeing a lot of our direct competitors doing.**

Elizabeth Bell, Director of Product Management, Brooklinen

### 3. Price transparency and custom discounts

Ensure buyers have the relevant context they need to make informed buying decisions by displaying accurate and negotiated wholesale discounts, as well as tax and shipping estimates.

- Customize pricing based on:
  - The specific customer or customer group
  - Products or variants in cart
  - Quantities of products or variants being purchased
  - Geographic location (i.e. multi-currency)
- Personalize discounts, exchange rates, and tax information
- Show prices with or without tax, depending on the customer

### 4. High-converting cart and checkout

The best carts are built to accelerate the customers' path to checkout and the best checkouts are built to convert. The right ecommerce platform will be able to leverage and expose many of the smarts and customizations of checkout, including:

- Access wholesale pricing, payment methods, payment terms, and applicable discounts
- Enter a PO number
- Vault a credit card for immediate payment or future use by the merchant
- Edit shipping information at time of checkout
- See location-specific information for shipping, tax, and currencies

There are also checkout features that ensure back office processes run smoothly. Key features include the ability to:

- Customize the checkout experience on a per-customer basis
- Review, edit, and approve customer orders
- Implement custom logic around payment and delivery options
- Enable your choice of payment gateways
- Give sales reps the ability to place orders on behalf of customers within the admin or the online store

## 5. Flexible payments

Cash flow is the lifeblood of any business. Your B2B ecommerce platform should make it convenient for your customers to pay however they want—and painless for you to collect payments. The right payment features will ensure you get paid on time, every time. Consider a platform that has the following payment capabilities:

- Enable payment terms on a per-customer basis, and choose from a variety of different payment term options (e.g. due on fulfillment, net 30)
- Charge vaulted credit cards within the admin or at checkout
- Send invoices
- Offer customizable payment methods at checkout
- Set up automated payment reminders to send to customers when payments become due or overdue

Meanwhile, your customers should be able to:

- View past orders and payment history
- Reference PO numbers included on past orders
- Automatically track outstanding payments on orders
- Easily manage invoices
- Pay for orders as payments become due or overdue

## 6. Reliable and accurate product information

Ensure your customers have access to everything they need to know about your products so they can place orders with confidence.

- Upload high-quality product images, videos, and imagery
- Customize product descriptions (e.g. different tabs or sections and their layout)
- Add custom product information like detailed dimensions and style specifications

## 7. Customer relationship management (CRM)

A best-in-class ecommerce platform should be the source of truth for your entire business. Gain access to your most critical customer insights with streamlined access to first-party data that can supercharge your business.

- Create detailed customer profiles that support a non-linear, complex buying process
- Dedicated fields for:
  - Company locations
  - Payment terms
  - Price lists and product catalogs
  - Tax ID
  - Multiple contacts within the same company
  - User roles and permissions for different contacts and departments within the company
  - Cross-channel touchpoints and interactions
  - Customer lifetime value
  - Product preferences and needs
  - Marketing and communication preferences
  - Previous transactions
  - Customer notes
- Add custom fields that are not offered out-of-the-box
- View out-of-the-box reporting and analytics



## 8. Marketing and promotional capabilities

Marketing should never be an afterthought. While B2B businesses typically have a lower marketing spend than DTC, maximize your impact by ensuring your platform enables:

- SEO optimization through meta titles, descriptions, URLs, and XML maps to name a few
- Built-in email capabilities to sending emails to prospective and existing customers, including promotions, abandoned cart recovery, and transactional emails
- Promotion capabilities like coupon codes, discounts, and free shipping
- 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

## 9. Inventory and order management

Easily manage your entire ecommerce business from a single, intuitive admin. If you're already selling direct-to-consumer (DTC), your B2B platform should be able to give you one single view of your inventory and orders.

- Manage all of your orders from multiple storefronts and selling channels in one place
- See inventory levels for any number of warehouses in one place, with automatic stock level updates for your customers

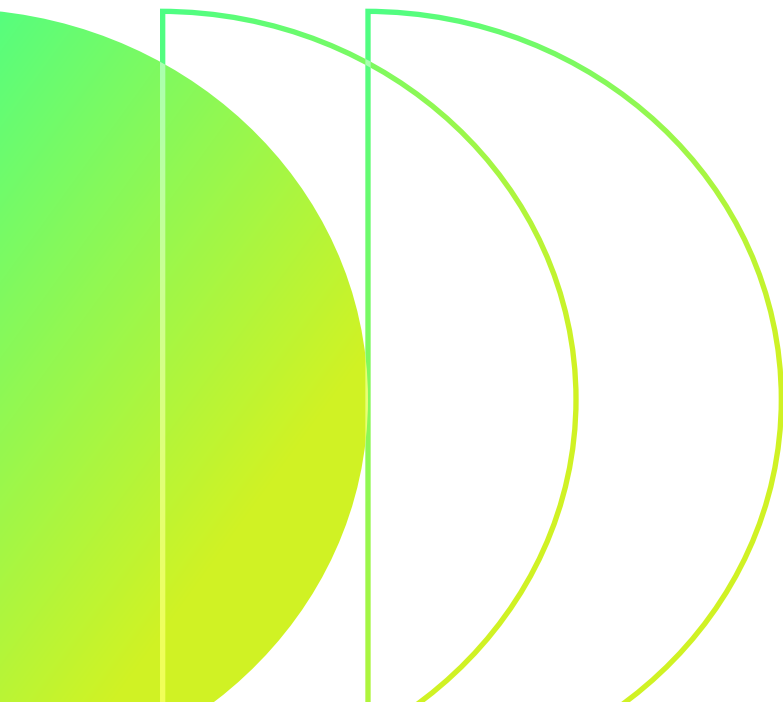
## 10. Robust integrations and ecosystem

If you're an established wholesaler, you'll want to make sure your commerce platform can integrate with your existing backend systems. And if you're new to B2B, there's certain B2B software you'll eventually need.

Each ecommerce platform has a different default setup and different associated integration costs. Choose a platform with a robust network of 3P apps and flexible B2B APIs, enabling you to easily integrate your existing tech stack or extend the functionality of your store as your business grows.

More often than not, you'll need integrations with the following B2B software:

- Enterprise resource planning (ERP)
- Customer relationship management (CRM)
- Product information management (PIM)
- Warehouse management system (WMS)
- Third-party logistics (3PL)



# Additional platform considerations

When you're evaluating an ecommerce platform, you need to look beyond just the individual features it offers. Here are other key factors to consider when narrowing down your list of B2B ecommerce solutions.

## Ease of use

Many B2B-oriented software platforms are stuck in the past. The customer experience is often outdated and clunky to use, making it difficult for a customer to find what they're looking for. Similarly, on the merchant side, such platforms can take ages to deploy and require a large team of developers to build and manage your store. 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 a simple, yet powerful admin, or templates for custom pages of your website. Navigating the platform should be straightforward and intuitive for both you and your customers.

## Flexibility

Let's say you want your B2B store's look and feel to match your DTC website, but your platform requires extensive development work to make this happen. Or you want to offer a wide range of payment methods, but you can only offer one to all of your customers.

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.

## Security and reliability

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)

Choose a platform that will protect you from security challenges.

## Scalability

Your ecommerce store currently allows you to sell to 100 business customers. Will the same platform work for you if that number jumps to 500? What about 10,000?

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.

## Omnichannel

To secure customer loyalty and two-times-greater share gains, wholesalers must make omnichannel a cornerstone of their value proposition and selling model.

B2B buyers have settled into using an evenly divided mix of sales channels, using multiple channels across the purchasing journey and within every buying stage of that journey. The platform you choose must be able to make these channel handoffs as seamless as possible.

# Sell B2B with Shopify Plus

## Skyrocket your revenue growth with B2B ecommerce

The right platform for transformational growth offers clear advantages:

- Empowers your customers to self-serve their own account 24/7
- Automates manual tasks
- Customizes every customer touchpoint
- Delivers on omnichannel demands
- Streamlines internal processes and guarantee time saved between your team and your customers

If you're not already on a platform that can accommodate your business needs, now's the time to consider it. At Shopify, we recognize that the decision to adopt a new technology or expand into a new channel isn't an easy one, but it shouldn't be a disruptive or time-consuming process either.

Choosing Shopify Plus is choosing to partner with an extensive support network committed to your growth. You'll have access to more than 20,000 app developers and agency partners who know Shopify's platform in and out, and can offer services related to everything from store setup and implementation to branding and content.

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**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

**Grow your brand 120% year over year with Shopify Plus.**

Contact us