B2B Commerce New Solution Checklist

Here's a series of items to review while working through your requirements for a new online commerce system. It can help you prepare the right questions to ensure a potential solution can accomplish what you need.

Presented by ZOEY

B2B eCommerce Website Basics

Modern B2B and wholesale sites benefit from cost savings and efficiency boosts from standard B2B capabilities now available on many platforms.

- [ ] **Wholesale Registration Capability**
  Let new wholesale customers register and provide the required documentation to be able to purcahse online.
- [ ] **Public Catalog**
  Allow your products to be publicly visible for potential customers and SEO benefits.
- [ ] **Hide Pricing on Public Catalog**
  If your pricing is proprietary or varies by customer, you may wish to not show pricing on your visible-to-all portion of the website.
- [ ] **Add to Cart Only for Registered Customers**
  If you do not wish to have guests shopping on your site, you can restrict the cart to only appear to logged in customers.
- [ ] **Require Login to View Site**
  Many B2B businesses choose to lock down their ordering portal to only those who are registered.
- [ ] **Advanced eCommerce Analytics**
  Customer and ordering pattern insights; see most profitable successful products and customers; segment customers for marketing purposes based on various criteria; etc.
- [ ] **Quick Order Screen**
  Quickly search products or enter SKUs and quantities for bulk addition to the cart.
- [ ] **Table/Catalog Shopping View**
  Easily display a group of products for easy skimming/ordering vs. having to view products one by one for addition to the cart.
- [ ] **Catalog Search**
  Ability to search across the store for items; additional needs may include SKU searching, searching for parts by product, fuzzy search, etc.

Customer Self Service Options

Some customers will take the reins if you give them the right tools, freeing up salespeople to focus on acquiring more new customers.

- [ ] **Order History**
  Let customers see orders placed and track progress.
- [ ] **Manage Customer Information**
  Let customers save billing and shipping addresses, as well as credit card information for easier order placement.
- [ ] **Reorder Capability**
  Leverage a previous order to be able to build a new cart and place an order.
- [ ] **Recently Ordered**
  See a list of SKUs most recently purchased for easy placement of a new order.
- [ ] **Saved Lists**
  Allow customers to save important SKUs to a list for easy finding later.
- [ ] **Sharable Product Info**
  Ability to email either a product page or the info about a product easily to other buyer stakeholders.

Salesperson Support

Give your salespeople tools to help them complete sales faster, reducing overhead, and manage more customers at any given time.

- [ ] **Online/Offline Mobile App**
  Look up product information, customer-specific pricing and other information. Capture orders or create sales quotes, even when offline. Sync when back in service.

- [ ] **Link Orders/Customers to a Salesperson**
  Make it easier to track commissionable events and orders/customers managed by a given salesperson.

- [ ] **Draft Orders for Customer Approval**
  Allow salespeople or customer service reps to build orders based on customer requirement or history and send to a customer for approval.

- [ ] **Tablet/Laptop Friendly Front-End**
  Ensures a salesperson can work with their customers on site and build an order in real time.

- [ ] **Order Comments**
  Allow customers and salespeople to easily communicate within the online store through commenting. Also empowers customer service, fulfillment and other roles to have similar capabilities.

- [ ] **Customer Analytics**
  Understand the buying patterns of a salesperson's customers, and identify who's overdue for a purchase based on previous buying patterns. Know when it's time to encourage a re-order.

- [ ] **Communication Management**
  Provide ways for salespeople to communicate with customers on draft orders, as well as placed orders, to confirm details about a transaction and updates as an order flows through the fulfillment process.

Product Management

Set up your products once and have them work for all your customer types, in one store, with fewer costly errors in pricing and orders placed.

- [ ] **Tiered Pricing**
  Set quantities where price breaks kick in for volume orders. Can be on a single product or across a set of products.

- [ ] **File Attachments**
  Non-image attachments of important product data, such as marketing one-pagers or product spec sheets. Can take the form of PDFs, Word/Excel documents, etc.

- [ ] **Backordering Capability**
  Let customers request an alert when items or back in stock, or the ability to backorder and have it automatically shipped when back in stock.

- [ ] **Sale Pricing**
  Be able to set sales with start and end dates, including the ability to so by customer group.

- [ ] **Quantity Increments, Packaging and Minimum/Maximum**
  Decide in what unit steps product can be bought and how they're displayed (1 case to user, 12 units of inventory), as well as a minimum/maximum. Rules can differ by customer group.

- [ ] **Template Management/Multiple Product Templates**
  The ability to assign different product templates to different product types for proper display/merchandising based on what you're selling.

- [ ] **Mixed SKUs to Achieve Case Quantities**
  For wholesale ordering, the requirement to order by the case to achieve the needed volume may allow for mix and match of products to reach that quantity.

- [ ] **Item Weights**
  Shipping and fulfillment companies increasingly rely on weight as a facet for pricing, and many businesses therefore account for this in their product catalog data.

- [ ] **Price Suffixes**
  List a suffix for pricing, such as $x/sqft or $x/lb.

Buyer-Specific Features

You can personalize the shopping experience for each account, boosting sales and encouraging more online ordering.

- [ ] **B2C and B2B Sales on the Same Site**
  Allow B2C customers to have a browsable shopping experience, including the potential for guest checkout, while providing your B2B and wholesale accounts a more streamlined ordering portal when they log in

- [ ] **Pricing by Customer Group**
  Set pricing structure that differs based on what customer type they are.

- [ ] **Catalog Segmentation**
  Show certain products to only certain customer types, or even present a completely different catalog or catalog options to different customer groups.

- [ ] **Shipping Options by Customer Group**
  Offer freight/LTL or other shipping options for larger B2B customers; standard UPS/FedEx for smaller customers; etc.

- [ ] **Payment Options by Customer Group**
  Allow for choices like credit card, check, net terms, etc. based on customer type and their approved payment types.

- [ ] **Theme Segmentation**
  Show different themes or marketing information to each customer group, ensuring they see the information and products front and center, as well as the tools that customer group needs to order quickly (such as pre-populated order forms).

Billing Features

B2B Commerce generally requires more types of billing options to reflect the diverse array of payment options in the B2B ecosystem.

- [ ] **Credit Cards**
  Accept credit cards for instant payment collection from business customers. Level 2/3 support can bring down fees because of the reduced fraud risk, and more business-oriented capabilities.

- [ ] **ACH**
  Accept payment directly from other bank accounts electronically at a heavily reduced cost compared to credit cards.

- [ ] **Deposit and Balance Billing**
  Divide an order into multiple payments, such as a deposit/balance scenario, or billing increments over time, based on the terms an order requires.

- [ ] **Invoicing**
  Send invoices for payment capture directly from the B2B Commerce solution, as opposed to needing to send it to an accounting solution. Great for those businesses who wish to manage everything related to online commerce from a single location.

- [ ] **Net Terms (Buy Now Pay Later)**
  Set payment terms, customizable for each customer that allow an account to buy now and pay later. Display for both your buyers and your internal team which orders have been paid, which are still open and which are past due.

- [ ] **Lines of Credit**
  Set credit limits for each account, allowing them to buy now and pay later up to the amount you've approved each buyer to obtain.

- [ ] **Store Credit**
  Some businesses prefer to issue Store Credit over cash refunds as a way of managing their returns.

Advanced Capabilities

Larger and more complex B2B businesses may have additional requirements to successfully execute on their business requirements.

- [ ] **Abandoned Cart Capabilities**
  Remind customers to return and complete a purchase if a cart is left behind.

- [ ] **Accounts**
  Have the ability to link multiple user logins under one account, with shared order histories and the ability to see what everyone across the account is doing.

- [ ] **Order Approval Workflow**
  Allow multiple people within a company access to a site, with one having approval rights to all orders placed by anyone within the org, or when certain criteria (such as order size) triggers a review.

- [ ] **Staff Account Restrictions**
  Be able to assign roles for your internal staff accounts for the store back-end, restricting access to only certain functionality, or only see certain customer data

- [ ] **Sales Quote**
  Salespeople can send a quote to a buyer for review and instant conversion into an order. Customers can submit a draft order for pricing confirmation before placing an order.

- [ ] **Split Orders**
  Divide an order up based on needing to send portions of an order to different distributors for fulfillment.

- [ ] **Promotions Engine**
  Some businesses need robust promotional pricing control to manage overstock, clearance and other pricing scenarios designed to move product more quickly.

Integrations/Data Sharing

Integrations/data sharing can take the look of a few forms:

- Direct, automated integrations that already exist. Some connector companies out there have already bridged a variety of solutions, and you can buy them off the shelf.
- API connectors that can be pre-built or may be custom built. Many solutions, including Zoey, have APIs that make data accessible to pass back and forth.
- Bulk import/export capabilities that push data from one system to another via CSV. This can be done in an automated fashion (automatically generate and upload a file, for instance, for another system to download and process) or manually by a member of your team as needed.

☐	**Integrate with accounting software** Link to the accounting software you use internally; push orders into the system for easier record keeping Name of accounting software: ____________________________
☐	**Integrate with mailing list software** Registered customers get automatically pushed; work with cart data and analytics software to segment customers for marketing purposes. Name of mailing list software: ____________________________
☐	**Integrate with CRM software** Pull existing customer list into eCommerce platform for ordering capabilities; push new customers into CRM along with orders and other pertinent information. Name of CRM software: ____________________________
☐	**Integrate with ERP software** Pull new products into the eCommerce system; push orders and other updated information into the ERP. Name of ERP software: ____________________________
☐	**Integrate with marketing solution** Pull in eCommerce data for better marketing decisions. Name of marketing solution: ____________________________
☐	**Miscellaneous integrations** Name of integrations: ____

Next Steps

If you've completed your review and filled out your checklist, congratulations! You've taken the first step in getting organized to ensure your next eCommerce site will fulfill your needs.

This checklist was provided by Zoey, a B2B and wholesale order capture and management solution that can help you with all of the above and more. Contact us and we'll show how your business can benefit from Zoey, leveraging the features you've selected in your checklist:

SPEAK TO A SUCCESS MANAGER

About Zoey

Zoey is a powerful order capture and management solution for B2B and wholesale businesses. Our suite of B2B capabilities includes quote generation, customer groups, access restrictions, quick-order capabilities and more. B2C-standard capabilities are also included to empower merchants to let their customers self-serve common needs like reordering, order status and account maintenance. Businesses can even run B2B and B2C sales off the same account, leveraging efficiencies to support all customer types.

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