B2B eCommerce Requirements

Manufacturing, Distribution & Wholesale

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Overview & Purpose of Document

This document outlines the necessary eCommerce software requirements for a typical B2B company. We use the term B2B to refer to any company selling directly to other businesses, government entities or nonprofits. These requirements are intended to be a starting point for your team, and can be used to help you customize a requirements document that's based on your specific business use case.

When looking to source an eCommerce platform, you'll find that the vast majority of existing solutions have significant technological and functionality gaps. These platforms typically fall into one of two camps:

+ Retail software with great merchandising/marketing capabilities, but limited B2B functionality.
+ B2B software with exceptional back-office, but limited merchandising/ marketing capabilities.

Understanding this landscape enables your team to select the best solution, with the right balance of back-office functionality and merchandising/marketing capabilities.

001 Key B2B Concepts

There are a number of key concepts that are unique to B2B eCommerce and are important to understand before starting implementation:

Account Management

When selling to organizations, there's often a need to have multiple layers of accounts. There will typically be a "Parent" account for the organization and various levels of "Sub-Accounts" in which company employees can make purchases on behalf of the larger organization.

Inventory Availability Information

Often a buyer's decision to order from company A vs. company B comes down to who has the inventory and when it can be delivered. The ability to give up-to-date and accurate availability information becomes instrumental in gaining and retaining customers, while minimizing the workload of providing manual estimates over the phone.

Pricing

The other key metric buyers use in their purchasing decision is price. It's essential to provide competitive pricing and to have the ability to showcase various price points based on economies of scale. Typically, this is highlighted in quantity-based pricing and various price tiers, based on the volume of product that a customer orders. These can also be pre-established price rates that a sales rep has negotiated with the customer. Whatever the methodology, it's critical to provide accurate pricing based on the account that is logged in, and also display potentially better price points to encourage increased ordering.

Bulk Order & Re-Ordering

Sale orders in B2B eCommerce often have large quantities: tens, hundreds or even thousands of items on a single order. Retail eCommerce platforms struggle with the usability of the data at this

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scale. Bulk order entry requires a different user interface to allow key features, such as the ability to duplicate a previous order and use it as a starting point for new orders, which make the system useable.

Payment Methods & Approval Cahins

In B2B eCommerce, it's not uncommon for transaction totals to reach thousands or even hundreds of thousands of dollars. Using credit cards for transactions of that size simply isn't logical for many companies, so it's critical to allow the submission of Purchase Orders, with terms. However, offering this service requires work on a number of additional functional requirements such as establishing credit limits, entering PO numbers, generating invoices and tracking invoice payments. In addition, the system should provide a process for an employee to initiate a transaction and then have it approved by someone in procurement or finance.

Multiple Fullfillments & Shipping Addresses

When placing large orders, a customer may need to have items shipped to multiple locations. There are many features, outlined below, that can assist in this process. Additionally, it's essential for the eCommerce application to determine the best location to send goods from when providing shipping rate quotes. Providing real time, accurate, and competitive shipping rates is extremely important to gain new customers, satisfy existing customers and optimize shipping costs and timing.

System Integrations

Lastly, it's important to note that product catalog, inventory levels, account information, and order/fulfillment details may need to be pushed and pulled from third party systems such as ERP, CRM, Account, Warehouse Management or other software applications. In fact, both vendor systems and customer systems often need to be integrated. It's critical that the eCommerce system be able to easily integrate with these types of platforms and do real-time data handoffs when appropriate.

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002 Online Store Front-End Requirements

General Requirements

+ Mobile-friendly design (responsive design)
+ Speed of website (critical to conversion rates as the two metrics are directly linked)
+ Security and ability to gain user trust, especially as orders may be for large dollar amounts
+ Password protected areas of site, or even the entire site
+ Password protected specific aspects of the site, such as price and add-to-cart
+ Multiple currency support
+ Multiple language support
+ Landing page functionality for PPC & online marketing efforts

Product Listings

+ Quickly search for products by name, product code, serial number, upc, etc.
+ Filter product listing based on ANY attribute (color, material, type, etc.)
+ Sort product listing based on ANY attribute (price, newest, popular, etc.)
+ See various color options and alternate images from listing
+ View products in a single-row per product table, similar to PO sheets, in addition to the more traditional retail product grid of image
+ Customize product table columns so that key attributes used for comparison can be lined up top to bottom, along with price
+ Display quantity boxes and bulk "add-to-cart" options directly from a product listing page, recreating the traditional paper-based PO generation feel
+ See different "Price Tiers" based on account logged in
+ See availability/inventory levels with expected delivery dates

Product Details

+ Purchase multiple variants of a product (size, color, etc.)
+ View detailed inventory details such as warehouse location, etc.

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002 Online Store Front-End Requirements

+ View the MSRP and potentially a calculated margin

+ Display special sale/clearance pricing

+ Display quantity-based pricing

+ Display product name, description, advanced specifications, and other attributes

+ Download product files such as spec sheets, user manuals, warranty documents, etc.

+ View compatibility information with other products

+ View estimated delivery dates based on addresses an account has on file

+ Add secure member or customer-only support content for post-sale support, such as downloads, warranty cards, etc.

Shopping Cart

+ Add promotion codes for various promotion examples (%Off, Amount Off, BOGO, etc.)

+ Create promotions like "Free Shipping" or "Discounted Shipping"

+ Create promotions based on the items in the cart (buy 5 item x, get y)

+ Create promotions for backordered items

+ Add marketing messages and more information on the cart

+ Push marketing "upsell" offers based on the item(s) in the shopping cart, in which an item is replaced with more expensive item

+ Push marketing "Cross-Sell" offers based on the item(s) in the shopping cart, where additional items are promoted to be added to the cart

+ Specify multiple "Ship-To" locations within the same order

+ Add and remove items from cart

+ Save shopping cart for later purchase

+ Share shopping cart with other people in the organization

+ Print shopping cart as a quote, or to mail/fax in as an order

+ Send out multiple abandoned cart emails to increase conversion

+ Generate unique promotional codes for abandoned cart email discounts

+ Output the shopping cart in a data format that can be imported as a PO into an ERP or account system for the customer

Checkout

+ Submit an application for a new organization account

+ Create a new account under an existing organization account, possibly by having a matching @xyz.(com|gov|org) that can then be verified

+ Require an approval process for new account creation

+ Upload reseller certificates or enter reseller numbers to allow for tax exemption

+ Ability to save shipping and payment defaults when logged into an existing account

+ Ability to create child accounts that belong to multiple parent accounts, and determine which parent account a purchase is for

+ Allow for custom data fields, instructions or notes on the orders from customers

+ Enter shipping information to designate where the item(s) should be delivered

+ Enter multiple shipping addresses for different products and/or for a given quantity of products in the shopping cart

+ Take credit card information and store that card information in a PCI secure way for use on automatic subscription renewal, when it makes sense

+ Accept PO # and payment terms instead of credit card

+ Use account credits as payment (typically issued for returned merchandise)

+ Ability to split payment across multiple payment methods

+ Create a customizable checkout flow: single-page checkout or multi-page checkout

+ See shipping rate quotes across multiple fulfillments

Confirmation Page

+ Add conversion tracking

+ Customize the confirmation page with potential "next order" items

+ Show how close purchasers are to reaching a better price tier

+ Automated email(s) to purchaser for personal records

+ Automated email(s) to an organization's finance department or other related accounts

+ Ability for employees to push the transaction they just completed into their company's expense tracking system, such as Concur

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002 Online Store Front-End Requirements

Online Account Request Page

+ Take new applications for account creation requests

+ Accept specific approval documents, like certification files

+ Take specific inputs, such as license numbers

+ Input expected transactional volume, company size and other qualifying characters

+ Input existing offline account ID to match an online account with an existing offline account

My Account

+ View stored shopping carts and quotes

+ View previous transaction and order history

+ View shipping/tracking numbers from orders

+ View and edit preferred payment methods

+ Manage "sub-account" acceptable payment methods

+ Manage "sub-account" purchase limits

+ Manage "sub-account" shipping addresses

+ Manage "sub-account" permissions to control what they can see and manage (such as shipping address, payment method, etc.)

+ View invoice payment history

+ View outstanding account balance

+ Update general account information, such as addresses, email and phone numbers

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003 Communication / Email Requirements

Transactional Email Messages

+ Order Confirmation

+ Shipment Confirmation

+ Account Statements and Credit Account Balances

+ Forgot Password

+ Device Activation Confirmation

+ Transaction Approval Confirmation to Parent Accounts

Marketing Email Messages

+ Abandoned Cart Emails

+ Upsell Offers

+ Promotion Emails

+ Customer-Segment Targeted Emails

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004 Backend/Platform Requirements

General System Requirements

+ PCI Compliant & Secure
+ Robust APIs preferably using modern technologies such as REST & JSON
+ Ability to upgrade
+ Ability to be customized when necessary
+ Set various permission groups for access control (admin, customer service, etc.)
+ Ability to log different changes to data (products, accounts, orders)
+ Secure traceability into who has logged in and made changes

Order Management

+ View list of orders in the various states (new, processing, closed, etc.)
+ Edit any details of existing orders
+ Ability to cancel orders
+ View payment transaction information about orders
+ Place telephone or in-person orders via the administrator
+ Place wholesale orders at different price points
+ Fulfill orders including packing slips, invoices and shipping labels
+ Ability to do partial fulfillment
+ Manage backorders
+ Manage preorders
+ Ability for customer service to make comments on orders
+ Trigger status emails to customers
+ Define order processing workflows so that orders can be moved through a series of steps easily

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Product Management

+ Add merchandising information to products that may not have come from an integrated product catalog system, such as ERP

+ Upload and automatically resize product photography

+ View inventory levels across multiple warehouse locations

+ View pricing information broken out by price tiers and quantity-based pricing

+ Upload necessary supporting information such as files, etc.

+ Merchandise where products appear on the website

Customer Management

+ Search customer database

+ View related accounts, specifically those in a parent/child relationship

+ Ability for child accounts to belong to multiple parent organizations

+ Generate lists of customers that purchased specific products, which is specifically important for issuing recalls

+ Create data segments of customers for follow-up marketing

+ Update customer payment information manually

+ Store custom data with the customer

+ View and edit pricing tiers for customers

Reporting Tools

+ Create Sales Reports

+ Report on top-performing products, pricing and promotions

+ Report on gross margins

+ Ability to do date-range comparisons on reports

+ Filtering and sorting on reports

+ Save report customization to be shared internally

Content Management

+ Add marketing messages to all front-end templates

+ Create blogs with categories for content marketing

+ Categorize content

+ Ability to do on-the-fly HTML edits without calling a developer

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004 Backend / Platform Requirements

+ Search content

+ Stage content changes with drafts

+ Schedule publish date and times

+ Create new pages and edit existing

+ Create custom data associated with content

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005 Integration Requirements

Payment Processor Integration

+ Store customer credit card information, typically called tokenization
+ Use payment processor account updater functionality for expired cards
+ Process authorization, charge and credit transactions
+ Swap payment processors for best transactional rates

Shipping Integration

+ Calculate shipping rates from providers (FedEx, UPS, USPS, DHL)
+ Integrate with various freight providers, including land, ship and air
+ Look up multiple rates and give customers the best rate
+ Print shipping labels, and schedule pickups
+ Integrate with fulfillment software and send tracking numbers to customers
+ Generate return orders

Accounting System Integration/ERP Integration

+ Push orders and subscription renewals into accounting systems
+ Pull inventory levels
+ Pull expected delivery times from an ERP

Fulfillment/ Drop Shipper or Manufacturing Integration

+ Integrate with third party fulfillment providers or manufacturers
+ Pull order shipment statuses from fulfillment providers to update customers
+ Add fulfillment-provider charges on top of shipping fees

CRM Integration

+ Sync accounts with a CRM system
+ Import orders generated from a CRM system
+ Allow for quotes to pass back and forth between CRM and eCommerce
+ Allow push account purchase history into a CRM

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005 Integration Requirements

Authentication Systems (LDAP, OpenID, OAuth, +)

+ Authentication Systems (LDAP, OpenID, OAuth, etc.)

+ Integrate with existing enterprise authentication systems like LDAP

+ Support existing custom authentication systems

006 Hosting, Security & Support

Hosting & Security

+ Platform should be able to be hosted in modern cloud infrastructure (AWS, Rackspace, Google)

+ Platform and hosting should have SLA that guarantees uptimes

+ Platform and hosting should be PCI compliant and PA-DSS certified

+ Platform should have a development environment for testing purposes

+ Automatic upgrades for functionality and security

+ Automatic security patches installed on hosting environment

+ Minimum of daily data backups

+ Automated status alarms/notifications if services go down. This is critically important if active devices are relying on the entitlement APIs to be up 24/7

Professional Support

+ Ongoing support for any customizations that need to be made

+ Administrative support on an as-needed basis when issues arise with the platform

+ Disaster support when servers go down, etc.

+ Training services for new staff

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