CLARITY

B2B eCommerce Integrations Best Practices

B2B eCommerce Guide -- Executive Summary

B2B eCommerce sales are growing explosively, and most experts attribute that growth to companies that are borrowing design and user-experience tips from B2C playbooks and creating better user experiences for their customers. Every business buyer is also a consumer who often appreciates the conveniences and personalized design features that retail websites offer. However, there are real functional differences in how business platforms operate, so comparing the two marketing strategies is similar to comparing a car to an RV. Both types of transportation can get people to the store, but their underlying purposes, functionality and capabilities couldn't be more different.

This guide to building a B2B eCommerce platform explores those issues to educate company decision-makers about the benefits, risks and details of designing a world-class business platform. It's appropriate to note here that the guide often refers to business-to-business websites and operating software as "B2B eCommerce platforms" instead of websites, software and eCommerce stores or websites. That's because building a platform has many requirements that regular B2C commerce doesn't. For example, installing a software product -- regardless of features or advanced capabilities -- always has areas where customizations and configurability are needed. Each B2B platform has unique needs, sales processes, third-party integrations, enhanced shipping and handling requirements and other variables. No out-of-the-box software will adapt to every business, and only a few of the most basic operations can work within those limitations without changing their business processes to accommodate the software.

B2B eCommerce & Integrations understands these issues and developed this guide to expose planners to some of the intricacies involved in building, designing and launching a thriving B2B eCommerce solution. The company’s years of combined experience in developing B2B platforms and customizations have revealed deep insights into functionality, core features, custom features, front-end applications, back-office systems, the design process, deployment architecture, how to build a development team and how to select an operating platform.

Customization Is Key

If a business is a startup company or an operation with little business infrastructure, an eCommerce software product might suffice for handling today's needs. However, even the most basic operations may find that their needs evolve dramatically in just a couple of years and will discover that a more robust platform is needed. About 99 percent of B2B companies don't fit that simple business model, however, because they need complex integrations such as custom workflows, customer analysis, segmentation and personalization, multi-tiered pricing, multiple currency conversions, expanded payment options, expanded shipping and handling features, custom user interfaces and user experiences, drop-shipping capabilities and special ERP and CRM customization needs.

A B2B platform, as opposed to a software product, adjusts software to fit the business and automate operations. Platforms are built in modular fashion from "building blocks" that can be configured in multiple ways to handle business today and rearranged to meet new challenges and business opportunities. A robust API is the engine that provides access to all the endpoints of functions and features within the platform that transfer data throughout the system. This layer is used to integrate with applications, open source software, sources of business intelligence, offsite databases and internal operating systems to customize sales reports, user experiences, responsive design, special products and pricing features and hundreds of other business applications.

Approaching Development Like a Racing Team

Never think that any business in today's competitive market is safe because of its loyal customers, unique products or superior quality of its inventory or customer service. Business is a competitive race where passing a competitor doesn't mean anything when there are thousands of others in the race. The race is a continuous process involving many vehicles where each racing car represents one of the company's interests. Racing teams need pit crews, and B2B companies with many cars in the race, need an extraordinary crew to monitor analytics, develop sales leads, manage inventory and internal accounting, market the company through multiple channels, develop new products, and customize platform capabilities to drive new business.

Developing Core and Custom Features Instead of Changing Business Processes

Each time a company's operating software requires the company to adapt -- even if only marginally -- business operations become less efficient. The mandate for using software is to make work operations more efficient and automatic, so software should be customized to the business instead of businesses adjusting to the software. The savings in operational costs, increased sales opportunities, expanded leads for salespeople and greater customer loyalty deliver a premium benefit that easily justifies development costs.

Fostering B2B Functional Design

Responsive design refers to website architecture that adjusts to each device that site visitors use when accessing the Internet. This isn't always a simple problem of just scaling the size and reducing the number of areas shown on the screen's display. Even B2C companies commonly personalize site displays for their customers and design attention-grabbing site overviews for new site visitors. This approach is especially critical for B2B companies because they only have a few seconds to answer preconceived questions that B2B researchers have when they browse suppliers for their businesses. Returning customers also want highly personalized displays that remember them and their ordering histories and site behavior

Making Design a Team Effort

Any robust B2B eCommerce platform will have dozens of areas where customizations can drive business and increase back-office efficiency. The functional design process includes everything that a platform does and how it appears and functions for each company stakeholder and customer. It's not possible to design this kind of platform without building a team, managing standards for interoperability and collaborating with third-party business associates, design developers, content writers and editors and other content providers and generators like video production services. Each area of design requires custom planning, content curating, design elements and stakeholder input to build something useful, easy-to-use and aesthetically appealing. Savvy companies work closely with developers in the design process by assembling IT teams and assigning other company staff to develop content material based on originality, compelling copy, the specific context where each copy iteration will be used and targeted customer profiles or personas.

Upgrading IT Infrastructure

Regardless of software, it's critical to upgrade B2B IT infrastructure for more efficient business operations today and collaborative eCommerce and third-party integrations in the future. Robust platforms include a middleware layer that facilitates connections with specialty applications and back-office operating systems, an application server for connection-pooling and load-balancing, browsers to run software, development tools to build applications and customize features and Web servers outside the firewall to connect to the Internet and act as security buffers.

Managing Collaborations

Modern B2B platforms provide the custom tools for collaborating on projects, connecting with third-party suppliers, allowing staff to intervene when needed during customer self-service and providing communications tools like emails, buy and supplier directories, scheduling applications, central information libraries, custom dashboards and proprietary apps. Part of communicating and collaborating includes matching dynamic content to customers and stakeholders, managing complex supply chains, fostering transparency and visibility and working with business associate teams on business and customer service projects.

A recent study by the Aberdeen Group found that the number of companies implementing collaborations doubled in just two years, and smarter eCommerce collaborations with partners and customers are the major driver of this trend.[1] Direct collaborations eliminate delays caused by system handoffs, speed decisions, reduce operating costs and eliminate errors caused by poor communications. Higher levels of visibility generate faster information, fulfillment processes and conversions. Businesses get a better view of their operations, customers and associations.

Building a Development Team

This guide mentions a lot about teams because building a B2B eCommerce platform is a team effort that includes the software vendor, internal IT teams, company stakeholders, customer input, employee opinions and information available through marketing channels. Best practices for B2B success include building a development team that can work with the developer, learn how the platform works and take over administering the operation when they go live. Having an experienced IT team is no longer optional for a robust B2B eCommerce platform, so decision-makers should try to put together their teams before getting too far along in the planning process.

Choosing a B2B eCommerce Platform

The single most important decision in B2B eCommerce development is choosing the right vendor. It's important to define the company's needs including desired integrations and user experiences. Out-of-the-box software, as mentioned earlier, only works for limited B2B operations. Best practices for choosing a platform developer is to select one who work with the company's team, offers pricing and development transparency and has experience in customizing eCommerce platforms specifically for B2B companies.

The Statistical Battleground for B2B eCommerce

Throughout the guide, readers will find many statistics because big data, eCommerce and business trends guide business decisions better than any single factor in the digital age. Companies profile their clients, find business opportunities, change operations and decide on critical strategies such as building a better B2B eCommerce platform based on reliable statistics. Some of the key statistics that decision-makers should consider when assessing development decisions include these insights from Handshake.com:[2]

- Mobile searches are already topping desktop searches, so B2B companies need to develop mobile strategies because their customers are accessing their accounts from phones and tablets.
- More than 52 percent of buyers research products on their phones, and many of these are Millennials who expect the latest technology and user-friendly features.
- B2B platforms increasing offer unusual features such as selling products for other organizations in a Marketplace business model.
- 60 percent of companies report increased customer spending after implementing omni-channel sales and marketing strategies.
- B2B companies with integrated systems experienced a reduction in cart abandonment of 8.3 percent and visitor-to-buyer conversion rates of more than 20 percent.

Other statistics that favor B2B development include that businesses with 401 to 1,000 pages get six times more leads from their sites than businesses with only 51 to 100 pages. Leads developed through SEO efforts -- including inbound marketing -- have 14.6-percent conversion rates versus a 1.7-percent close rate for print advertising and direct mail.[3]

One interesting group of statistics regards the importance of connecting through other channels and developing a mobile marketing strategy. About 47 percent of Facebook users or 674 million people connect with the social site on a mobile phone at least once each day.[4] Many of these people use voice-activated searches, which creates a new way of structuring keywords that's more natural and less structured. That's a big trend for B2B marketers to consider. Even though mobile phones are the popular choice for searches today, that could easily change over the next few years because there will be more Internet-enabled devices such as smart appliances so that the total of all phones, laptops and PCs will only account for 25 percent of Internet connections. It's easy to see why B2B companies need to monitor trends and adapt to evolving marketplace conditions.

B2B eCommerce & Integrations proudly offers this guide as a starting point for decision-makers who have questions about building a B2B eCommerce platform, adding a business component to a retail operation or upgrading their website capabilities. Our team can help to guide you even further by working with your in-house development team, providing planning tools and templates and working with your stakeholders to develop a world-class B2B eCommerce platform. Read over the guide to get a sense of our company and our experience in developing custom platforms, and call or contact us anytime for answers to questions, further explanations or a consultation or price quote.

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Functionality of a B2B eCommerce site -- How to Approach Your Project

One of the keys to understanding how the development process works is studying an example of how a real project worked in practical terms. As a representative example, B2B eCommerce & Integrations offer the following analysis of one of its projects where skilled team members worked on a project that involved customizing Clarity's eCommerce development platform for the United Methodist Communications Phase 1 Project. A collaborative project approach is critical when developing these project processes:

1. Lifestyles and Milestones
2. Documents
3. Roles
4. Role Assignments
5. Communications
6. Management Monitoring, Supervision and Change Authorizations

Putting the right team in place and using techniques from the agile project management approach can speed development, foster greater collaborations between team members, represent the vested interests of company stakeholders and enable using greater outside resources that easily integrate into the effort. The agile approach offers many benefits for developing software and managing projects, but B2B eCommerce development differs in some particulars due to an increased number of stakeholders and fewer chances for incremental developments. B2B sites require extensive planning to map all the connections between features and customizations, so the planning templates, wireframes, workflows and design mockups need to be finished before building actually begins. However, once everything is designed, companies can use full browser prototyping to get key capabilities online as quickly as they are built and tested. As in agile project management, iterative development and testing occur during the construction phase.

It's critical to see proof that an eCommerce developer can deliver on promises, collaborate with multiple stakeholders, do the work and develop an integrated and comprehensive website. To that end, B2B eCommerce & Integrations offers this example of how its staff managed the process for United Methodist Communications.

1. Project Lifecycle and Milestones

During development, the project employed many agile project features, iterations, regular communications and testing. In larger development projects, some phases of B2B development can be divided into subcategories that follow their own lifecycles. Development efforts that require a continuous process can use full agile methodology. The slightly altered semi-agile process used for the United Methodist Communications Project followed this lifecycle:

Inception of the Project

1. Project Proposal Document
The preliminary planning phase consisted of creating a summary document and reviewing it with agile methods that allow each stakeholder to comment on the process, suggest revisions and reach a group consensus.

2. The Project Handoff Meeting

During the handoff meeting, different parts of the development are handed off to team specialists. Frequent handoffs can cause delays, so best practices include involving people in areas other than their specialties. Working in different areas of the project helps each stakeholder better understand the process by learning a little about each area of development.

The Initiation Process

In the United Methodist Communications Project, four areas were covered during the initiation process: preparing more detailed Project Summary and Scope of Work and Project Approach documents and hosting a Project Kickoff Meeting with the client and one with the Clarity development team.

Ongoing Analysis

1. Discovery Meetings, Group Activities and Exercises

As the project progresses, daily meetings, group meetings, creation of design mockups, stakeholder interviews, preparing inventories of features, mapping connections and other analyses were common. The agile process includes meetings where each group discusses its progress, answers questions and defines how its work relates to other aspects of the project.

2. Project Requirements Document

Ongoing preparation of an updated Project Requirements Document keeps everyone informed about the project's current status so that no stakeholder is surprised or blindsided. On large projects, one team can easily lose track of what others are doing, and this agile technique keeps everyone continuously updated.

Design Phase

During the design phase, teams map everything that's needed on the site, show how pages will connect and produce wireframes or blueprints that show functionality in detail. After those are approved, the following documents and design features are prepared:

1. Technical Approach Document
   The design process includes writing a preliminary document, getting it reviewed by the group and incorporating needed changes. Technical approach covers the coding and technical details of the development process,
2. Functional Design Document
   This record follows the same process as above but concentrates on development functionality and design features in the finished construction.
3. Technical Design Document
   This document is prepared when feasible, but not every project includes this effort for various reasons such as security concerns, protected information and other contraindications.

Constructing Platform Changes

The construction process is where B2B eCommerce & Integrations works with development teams to build the eCommerce platform or needed customizations to an existing platform. Throughout the agile process, the following three activities, if applicable, occur simultaneously:

- QA Test Plans
  Each completed function is tested exhaustively during the build, and iterative refinements are made.
- Software
  Software applications, integrations and performance issues are also subject to testing, code refinements, troubleshooting and performance on the many devices that customers use when accessing the Internet.

- Administrator and User Documentation
  These are usually focused on keeping administrators informed and follow the same iterative development and QA testing used concurrently in preparing documents. However, this deliverable is not always available for every project.

Testing and Quality Insurance

Testing and quality assurance efforts continue until the final testing. One session involves the development staff, and separate testing session is arranged for the client and executive decision-makers who sign off on the development.

Implementation Strategy

During the implementation phase, as anyone involved with development knows, unexpected trouble spots arise in most projects. That's why B2B eCommerce & Integrations offers an extraordinary level of service at this stage to train staff, validate the project and deliver documentation and source code. The process includes the following steps:

- Setting up hosting
- Offering staff and stakeholder training in using the features
- Installing the build
- Performing final validation checks
- Providing source code and project documentation through all stages of development

2. Project Documents

Project documents are critical aspects of the development process in agile projects, and the documents that were prepared for the United Methodist Communications Project included:

- **Project Proposal**
  This document defines estimates of the work involved for all proposed activities and features.
- **Project Summary and Scope of Work**
  The document file covers project goals, planned solutions, work activities and features that the project will deliver. The paper introduces EP Task IDs for each work story that can be compared with development progress at later stages.

- **Project Approach**
  The Project Approach Record defines all work processes, how work will be divided, technical details and assignments of project roles and user stories.
- **Project Requirements**
  This document covers the deliverables that development will generate including software capabilities, documentation, testing plans, special features and other functions.
- **Technical Approach**
  The technical aspects of the project are covered in this document that includes the tools, technologies, third-party resources, open source code and other details of how the software will be built.
- **Functional Design**
  This document includes a detailed schematic, mockup or prototype of every relevant website function, design element details and connective functionality, and real-world business users often review this source document. The record serves as the blueprint for the build and is used by developers, documentation writers, staff, marketing people and quality assurance analysts.
- **Technical Design**
  This record covers technical designs from an engineering overview and is offered in larger development projects that involve more complex developments and integrations. Smaller projects normally use Functional Design and Technical Approach documents to cover the necessary overview of their developments.
- **Test Plans**
  This documentation covers how developments will be tested by Quality Assurance staff throughout the development process.
- **Project Re-Estimates**
  Updates to projects, changes, cost overruns and even unexpected economies and faster progress can result in changes to project completion times, costs and other design parameters. Re-estimates are provided periodically throughout development.

3. Project Roles and Assignments for the United Methodist Communications Project

Project roles ensure that every stakeholder literally has a seat at the table, takes part in the development process, argues on behalf of vested interests and constituents that he or she represents and can review and comment on each iterative development through enhanced communications, collaboration, reviews and regularly scheduled group meetings. In some projects, more than one role might be served by the same person. The roles included the following real-world assignments in the United Methodist Communications Project:

- Development Project Manager (Clarity -- Craig Zmarzly)
- Customer Manager (Client Representative)

- Team Architect (Tim Heimsoth)
- Technical Manager (Chris Reddick)
- Business Analyst (Craig Bauer)
- Back-End Developer (Chris Reddick, Tim Heimsoth, James Gray and others as needed)
- Front-End Developer (Matt Tate, Eric Adam and others)
- Documentation Writer (TBD)
- QA Analyst (Raeanne Harshfield)
- Training Coordinator (Craig Bauer)
- Specialist in Operations and Accounts Receivable (Kristin Wagner)
- Graphic Specialist (Will Swain)

5. Project Communication Methods

Communications are keys to success in any agile development project, and with a company called United Methodist Communications, it's easy to see that communications would play a critical role. In this project, the following lines of communication were used:

- A Basecamp was established to serve as a central repository for messages, communications and sharing documents
- Emails were only used under certain circumstances because development communications should be subject to security concerns. Another reason why emails aren't used is that people often ignore emails when they're occupied or unavailable.
- JIRA Is used for tracking issues that need to be fixed that are discovered in testing or after the development begins construction or goes live. Using this technology ensures that bugs are tracked until resolved.
- GoToMeeting enables screen-sharing among participants when conferencing on the phone or their computers. The technology enables users to record the meetings for later review.
- Phone calls were used in critical situations, but these don't leave a record of what was discussed, so their use is only recommended for quick clarifications and one-to-one conversations about ancillary issues.

6. Change Management Monitoring and Implementation

Changes in projects are inevitable during the course of development. Best practices are to record those changes in a group repository like Basecamp for smaller adjustments and fixes. Larger changes should be documented in the latest version of the appropriate documents. Throughout the process, it's easy to track every important decision, change, adjustment, process and feature for full development transparency, which is the gold standard for any eCommerce development project.

Choosing Your Team Based on eCommerce Goals and Business Model

Visitors to the B2B eCommerce & Integrations can examine the company's portfolio to view recent work by its development team to get a picture of development best practices for different types of B2B customers. Most of the eCommerce companies that the website serves need a customizable and robust eCommerce platform to manage business-to-business sales, showcase products, provide sales leads, heighten customer experiences, manage real-time inventory updates, offer services, locate dealers, distributors and manufacturers and enable better third-party integrations with distributors, vendors, shipping carriers and other services. However, other types of B2B websites include the following business models:

E-Procurement Websites

These websites function as sites where purchasing agents can manage requests for proposals, submit product bids and eventually buy products after negotiating the contract. These sites usually specialize in fulfilling orders for niche markets or specialized industries.

Broker Sites for B2B eCommerce

These B2B sites act as intermediaries that bring together buyers and suppliers from various industries.

Infomediary Sites

These sites broker information about companies within a given industry and often serve as clearinghouses for industry standards and best practices and trade standards for niche markets

Vertical B2B Portals

These sites provide industries and researchers with detailed information about products, services,listings and other information for particular industries.

Retail Operations with a B2B Sales Arm

Many B2B eCommerce sales also have wholesale and B2B operations. These eCommerce websites generate multiple development demands and integrations for skillfully managing both types or operations.

Most B2B operations fall into one of these categories, but customizations call help each one to achieve its goals, craft personalized customer experiences, connect with customers and resources, manage operations and build a world-class platform.

Tips from B2B eCommerce & Integrations About Managing Your Project

We understand the concerns of stakeholders at B2B eCommerce & Integrations, but we offer an astonishing level of transparency such as this overview of a real-world project that our development team handled for Clarity and United Methodist Communications. At B2B eCommerce & Integrations, we handle projects of varying complexity from major eCommerce platform integrations to delivering your desired upgrades. We use the agile approach for faster development because the method is superior for involving multiple stakeholders, fostering communications, matching development to many B2B models and customizing sites to perform efficiently and provide high-quality user experiences for each user. Our work serves many needs and is always completed in the most professional way while involving others deeply in the development process. Call or contact us today to request a quote, consultation or answers to your questions about our project approach.

Website Functionality with Customization and Back-End Integrations

Few organizations will experience the explosive growth and rapidly evolving market trends that the B2B eCommerce industry will enjoy over the next few years, but most of these organizations struggle with building modern websites, marketing their products on mobile devices, building customer apps and making their websites highly functional but well-designed to satisfy a broad coalition of stakeholders. B2B websites must function fast and flawlessly while providing the same high-level design features that consumers enjoy on B2C websites. Unfortunately, companies never get all the tools they need from any out-of-the-box eCommerce software. Customization and back-end integrations drive website functionality and design, and administrators or corporate decision-makers have two possible choices for building greater functionality, scalability and appealing design features into their websites: changing to a platform that easily incorporates responsive design and user-friendly functions into their operating systems or adding back-end integrations to beef-up their eCommerce capabilities regardless of operating platform.

Integrating marketing strategies with B2B eCommerce operations isn't new, but creating custom features that deliver a synchronized message is among the new best practices of savvy B2B marketers. Marketers can deliver consistent messages through multiple advertising and promotional forums so that it doesn't matter where customers access information whether it's on a mobile device, laptop, desktop computer, company app or Business Page in social media or other digital forums.

Sales and Marketing Considerations for B2B Customer Engagement

Websites -- including those of eCommerce B2B companies -- no longer serve as simple product catalogs. Rosabeth Moss Kanter, a Harvard Business Professor who is considered one of the 50 top businesswomen in the world, suggested that website visitors make up their minds about your company in the first few milliseconds after visiting a website, and that includes the rapidly increasing number of customers that order from their mobile devices like smartphones and tablets. Success in eCommerce depends on engaging customers on social media, in app-generated searches and through other websites where targeted customers spend time. It's no longer possible to ignore people's browsing habits and remain competitive.

Statistics show that traditional marketing techniques don't reach customers, and having a well-designed website alone won't convince buyers to order from a given company. One research company found that 76 percent of B2B customers research multiple marketing channels before visiting a website, and most buyers are 57-percent ready to buy before even seeing the company's website.[1]

Metrics, buyer-behavior analyses and other back-end SEO and engagement strategies are essential to drive sales, attract new customers and engage customers by offering two-way communications to every customer. No two eCommerce sites work exactly the same way, and decision-makers can reach customers, inspire loyalty and increase sales by building a marketing juggernaut that brands the business, interacts with customers on multiple channels, provides automatic real-time updates to inventory, manages vendor relationships to ensure a smooth manufacturing process and responsive supply chain and offers buyers many choices for shipping products globally.

First Step: Analyzing Needs and Opportunities

Savvy decision-makers understand that the first step necessary to ignite sales is conducting a needs and opportunities analysis to know their customers and customize their online presence to reach and engage customers with personalized marketing. Today's functional website offers customers personalized messages, unique screen views on mobile devices based on their ordering histories and the ability to customize their orders. The process can be entirely automatic or trigger staff involvement in unusual or defined situations. Companies can't build this kind of efficiency without understanding their customers and customizing website capabilities.

CRP and ERP integrations are critical, and most eCommerce companies integrate offsite customer service options in social media, review websites and proprietary apps. Integrating multiple channels into operations allows customers to experience consistent and targeted messages across channels. Segregating customers is an ongoing process that requires focused studies of customer demographics, buying behavior, market-structure maps, supply and demand chains, client purchasing power and strategies to engage customers in two-way conversations and interactions.

Market segmentation best practices include the following activities:

- Segmenting the market by sales revenues, number of employees and geographical data
- Curating customers by their product choices and seasonal buying habits
- Developing company opportunities for expanding sales
- Engaging customers based on their online browsing habits
- Sectioning customers based on industry-specific data
- Using product applications to target customers
- Integrating supply side data into marketing strategies
- Studying analytics data to determine what motivates sales of each product, manufacturer or service

- Using SEO and keyword strategies to target customers from key demographic profiles
- Interacting with customer call centers to mine and use segmentation information
- Targeting customers based on brand and company loyalty

Consumerization of the Traditional B2B Model

Statistics show that B2B customers order on their mobile devices and through proprietary apps while finding businesses in nontraditional places like social media, review websites and other digital touch points. One research company predicts that B2B sales will double from 2015 to 2020 company and that the United States and China will be the top recipients of this increased revenue.[2] The research shows that B2B eCommerce companies need to move away from serving many customers toward offering more robust capabilities where customers can buy from many business associates and partners, which include dealers, distributorships, affiliated manufacturers and resellers, custom fabricators and service providers.

Another company finds that engaging customers through multiple channels increases lead-generation by up to 20 percent and delivers 10 percent more first-time customers, but no standard software connects and integrates automatically with all relevant customer touch points without fine-tuning the website's capabilities.[3] B2B customers now research companies, share their online experiences and review company products in many forums, so B2B marketers need to monitor the chatter, engage customers, respond to complaints and even thank customers for both negative and positive feedback. Those customer engagement strategies take a robust and customizable eCommerce platform that offers collaborating tools, SEO and marketing features, intuitive architecture, automatic marketing and powerful functionality that delivers extraordinary user experiences.

The best strategies for meeting customers and strengthening a company's online reputation involve embracing the new journey and customer attitudes that mirror B2C marketing and customer management. A single B2B customer can be geometrically more valuable, and wholesale companies and B2B suppliers need custom website features to deliver the kind of benefits that regular consumers enjoy. Peer-to-peer networks, social channels and explosive growth in the numbers and sophistication of other online communications channels make it critical to consumerize B2B websites with special features and functionality that allow buyers to conduct company research, read testimonials, follow formal buying procedures and request custom product options.

Better Collaboration Through Back-End Integrations

Better collaboration with each business stakeholder increases sales and optimizes marketing, but collaborating through multiple channels and devices requires strong back-end integrations with business operations that guarantee security, meet regulatory requirements and encourage buyer spending and more interaction with the company. The benefits of installing custom back-end collaboration tools include:

- Providing more choices for shipping and communicating directly with shippers
- Offering customized dashboards to customers, vendors and distributors
- Providing superior customer relationship management
- Automating promotions and advertising including emails, mobile marketing, newsletters and announcements
- Providing sales staff with timely leads
- Managing content and marketing strategies
- Offering incentives and tiered pricing
- Handling multiple currencies, different tax rates and cross-border tariffs
- Delivering real-time updates to internal departments and external stakeholders
- Granting access to authorized users while protecting proprietary information
- Prioritizing initiatives and accelerating response times
- Working with the supply chain and managing logistics
- Accelerating credit checks and approvals for volume discounts

B2B companies face many demands on their eCommerce software to generate sales, reach customers through multiple marketing channels, integrate orders with inventory, manage collaboration and deliver focused merchandising. Each company's IT team needs to assess its customers and their needs, the company's needs and opportunities and the custom features needed to deliver great experiences. Regardless of which software an eCommerce company chooses, it won't deliver everything needed without customizations and back-end integrations.

Training Employees and Stakeholders Directly

A highly functional and well-designed B2B website works for businesses 24/7/365 and automatically becomes a company's best salesperson and business supporter. Custom websites can speak every language of targeted customers, work without complaining, handle customer service, provide notifications, generate reports, engage customer, facilitate sales and generate leads. However, even the best sites won't work if the staff and stakeholders don't know how to use the systems. It's of crucial importance that each stakeholder receives essential training and learns promptly about any upgrades or new features. The company website must also be set up so that the proper information is channeled to the right departments and users. Decision-makers should always consider the time it takes to train websites, staff and stakeholders to deliver robust eCommerce capabilities where needed.

Training Staff and Stakeholders

The best strategy for customizing website capabilities depends on choosing a development partner that offers staff and stakeholder training so that each involved party can easily take advantage of new capabilities. If all stakeholders don't know how to use custom features, then their benefits quickly evaporate or could even cause negative results that include customer dissatisfaction, distributor confusion, vendor difficulties and employee misgivings. Best practices for training include not only training stakeholders how to use custom features but also explaining why and how the features benefit them. Key points that developers should cover in training include:

- Explaining how each customer has a lifetime value and how custom features optimize sales and customer loyalty
- Teaching each stakeholder how to use custom data to generate leads, monitor online behavior and use information from ERP and third-party resources
- Explaining stakeholder security and compliance responsibilities
- Training staff when to trigger automatic alerts and offer customer assistance
- Instructing staff in how to customize options manually
- Offering programmer training in how to monitor and test functionality
- Showing distributors the advantages of automatic processes

Optimizing Website Performance

Optimizing an eCommerce website's performance requires focused testing on multiple operating systems and devices, ensuring that the right information goes to all relevant departments and outside consultants and training stakeholders in how to implement and manage custom features. The benefits of working with developers to customize website functionality include:

- Showing staff how to troubleshoot problems
- Having outside engineers ready to respond to emergencies that internal staff can't manage
- Teaching stakeholders how and when to use optional customizations
- Ensuring that websites provide easy access to the most important information for each user
- Reducing the need for staff involvement by enabling automatic customer service options
- Providing relevant FAQs and resources to requests for further information
- Configuring websites to trigger special features, provide answers, facilitate special orders and pricing and deliver individualized messages
- Triggering automatic staff involvement when needed

Each successful eCommerce company spends a large part of its staff budget on training, so it makes sense to spend some time and resources on training websites to perform flawlessly. A reliable and skilled development partner can simplify the training process for stakeholders and company internal training staffs to enable all parties involved to access and use website custom features and learn about changes in new iterations to ensure the highest levels of performance, compliance and operations management.

Enhancing and Driving Business Through an Intuitive eCommerce Platform

Back-end integrations and platform customization can drive business through many contact points that include social media, customer review sites, business peer-to-peer sites, industry-specific websites, trade journals, trade show promotions and other nontraditional venues that targeted customers visit regularly. Adapting business to off-the-shelf eCommerce software is the weakest strategy no matter how much companies save. That doesn't mean that you can't add back-end integrations to improve functionality, but this strategy results in an imperfect solution that necessitates greater staff involvement, higher payroll and operating expenses, slower response times and reduced functionality.

Customizing Off-the-Shelf Software

One option is to customize standard software with back-end integrations to strengthen functionality, allow interactions with other businesses, distributors, vendors and marketing consultants and provide expanded customer options to browse relevant products, communicate with staff and request quick customer service. At a minimum, B2B companies need to offer real-time inventory updates, resources for locating dealers and distributors, automatic services such like tax computations for multiple states and global locations and simpler user registrations. In niche markets, eCommerce companies usually provide methods for purchasing agents to submit proposal requests, arrange to buy from specialty vendors and manufacturers and place bids for products and services.

Building a Custom Website to Fulfill Multiple eCommerce Needs

The smartest decision for forward-thinking B2B decision-makers is to choose a highly customizable, scalable and modular eCommerce platform that is easier to customize and upgrade as the businesses grow. There's no better time to customize B2B websites than in the current market because statistics show that B2B sales are predicted to grow at impressive rates for the foreseeable future. Custom integrations give customers the following functionality benefits that generate sales and improve customer satisfaction:

- Customers can check the status of their orders and view supply chain details.
- It's easy to view, download and print past orders.
- Options include downloading, viewing, printing and paying invoices.
- Customers can access information on assemblies, subassemblies and Bills of Materials.
- B2B customers can engage with eCommerce companies, provide feedback on products and access tools to perform research, read unbiased third-party reviews, customize products and speed deliveries or opt for less expensive shipping.

Synchronizing Integrations for Marketing with Customized B2B eCommerce Software

One of the greatest advantages of customized eCommerce software comes from being able to build a brand and company image. Marketing today depends on building a digital reputation, and it's important to synchronize marketing strategies and messages and not just integrate them into existing software. That's a major benefit of switching to customizable software with a built-in adaptive middle architectural layer that adjusts easily to new trends and marketing strategies to deliver a consistent message across channels that include social media, digital reviewing and promotional forums, proprietary customer apps and distributed Web services. Adaptive SEO strategies for paid, generic and third-party marketing and content-sharing applications enable companies to optimize searches and share testimonials and news with targeted prospects and customers.

Upgrading to an intuitive, customizable and robust eCommerce platform provides the best options for managing sustained growth and earning a fair share of rising B2B revenues. Custom features that synchronize automatically across channels also reduce operating costs, simplify collaborations, empower distributors and generate greater loyalty and customer satisfaction. However, customizing eCommerce platforms works more efficiently and costs less over time when decision-makers choose a skilled development partner that works with company programmers, outside engineers, staff and stakeholders to develop clean, intuitive and fully integrated customizations for better functionality.

Functionality Tips and Services from B2B eCommerce & Integrations

Regardless of platform, industry or targeted customers, you need a team of engineers and advisors who can work with multiple coders, open source engineers, vendors and distributors to customize your website so that it offers each customer and stakeholder intuitive functionality, targeted marketing messages, custom operating system displays and appealing design features. Our services at B2B eCommerce & Integration include fielding an impressive design team that specializes in designing custom integrations so that your website fulfills all the evolving demands of B2B eCommerce, which include generating leads, driving customer engagement and loyalty, providing full website metrics and incorporating automatic marketing features and SEO best practices into your website. B2B marketing today is no longer just a matter of optimizing market spend to revenue, standardizing your market practices and scaling your business. You have an incredible opportunity to optimize all your eCommerce teams and capitalize on cutting-edge website functionality with platform customizations, stakeholder training and increased customer engagement that can revolutionize your marketing approach to satisfy enlightened, educated and discerning customers. Call or contact us today at B2B eCommerce & Integrations for a consultation to see how we can ease the development process and work as trusted partners in meeting your business goals.

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Core Business Features Define eCommerce Capabilities

Functionality in B2B eCommerce websites depends on subsets of core and custom features, back-office tools, user interfaces, and even design considerations that affect what viewers see when they visit a website. Regardless of software platform, certain core business features are essential for highly functional B2B eCommerce websites, but how companies handle the various duties these features perform can determine success in competitive markets and impact every area of business operations. That's why it's critical to choose an operating platform where core business functions can be customized to specific industries and B2B models to foster greater functionality, appealing and intuitive interfaces for stakeholders, better communications and greater abilities to manage and monitor eCommerce operations throughout the buying and shipping cycles.

Addressing the B2B User Experience

Most people have shopped at Amazon or eBay and understand how convenient the buying process is at B2C eCommerce websites where the user experience or UX trumps every aspect of the business process. Although the B2B process differs in many ways, smart decision-makers in business-to-business marketing understand that the user experience is critical and not just for customers but for business collaborations, distributor efficiency, lead generation and important internal processes. The user experience provides astonishing insights into customer behavior and facilitates an amazing array of automatic processes and collaborative business efforts. A great user experience includes providing equivalent functions no matter which devices customers use to access the sites.

Google reports that 75 percent of Internet users prefer mobile-friendly sites -- including B2B customers -- and 96 percent have found sites that didn't function well on mobile devices. About 74 percent of people who visit mobile-friendly websites indicate that they're more likely to return, and 63 percent are more inclined to buy.[1]

Many B2B companies underestimate the value of the user experience because of the ways that B2B marketing differs from retail promotion. Some wholesale sites hide their best merchandise and deals as incentives for their biggest and most loyal customers, and others depend on their sales forces, distributors and affiliates to negotiate prices and land deals through tough negotiations. B2B customers seldom buy products through shopping carts, but that's often because the companies want to segment their customers by tracking their journeys through multiple areas of their websites and not because customers won’t order directly from online catalogs.

Those strategies, however, are exactly why UX customizations are so important. The Nielsen Norman Group reports that most B2B websites have less functional and usable websites that tested at a 58-

percent success rate versus a 66-percent rate for the average B2C website.[2] Customizing the user experience offers clear cost-value benefits for each B2B company precisely because each business has its own goals and marketing strategy and needs customized features to promote those goals.

Custom Access

Custom access not only allows companies to hide the good stuff but also facilitates offering those same items to preferred customers as soon as they visit the website even on a small-screen mobile device. UX custo-access features and high-level functionality empower customers and stakeholders at different levels by facilitating product research, follow-up support and getting quick answers to questions. Distributors, affiliates and vendors can check key facts, collaborate internally, automate routine processes and manage their work from customized dashboards.

Design Features

Design features work for B2B companies just as powerfully as they do for B2C companies. Most buyers don't place large orders through shopping carts, but some customers might buy at asking price without haggling, so catalog design should include an "Add" button and offer easy ways for new customers to register and customize and process an order instantly. The DMI Design Value Index discovered that the superior design features of B2B companies that spend money on things like creating better UX interfaces caused those companies to outperform the S&P Index by 228 percent over a 10-year period.[3]

Back-Office Integrations

Customizing UX experiences also streamlines internal processes by ensuring that each user's experience automatically updates in real-time based on inventory, pricing, areas visited and availability. Automatic alerts can trigger staff involvement, contact vendors for supplies, initiate product customizations and supply a steady stream of behavioral information that can be used for sales leads, content generation, messaging and other custom tasks.

Fostering Ordering Convenience

One of the greatest benefits of customizing core business features for B2B operations is optimizing fulfillment and ordering. Nothing hurts a business as much as customers having a frustrating experience when placing a big order. Most regular clients reorder often, so it's important to make the process as automatic and painless as possible. Highly functional websites allow customers to look up prices, repeat orders exactly, reorder items from past invoices and check real-time inventory and price quotes. Quotes for custom prices should automatically register for these customers if all the quote's conditions are met, but it takes a fully integrated system to generate sales staff price commitments without involving human intervention. Customized ordering offers conveniences that make it easy for busy purchasing managers to order from their smartphones. Customers can enjoy the following ordering conveniences:

- Customized order forms based on each customer's ordering history
- Complete access to account information to research products, check inventories, get new estimates or review active price quotations
- Ability to choose from multiple shipping and split-shipping options
- Options to get products from a distributor, affiliate or drop-shipping arrangement
- Support for bulk, repeat and regularly scheduled orders

Generating Multitiered Pricing

An old joke that has so many forms that it's become a meme essentially goes, "What"s the price?" The tagline is, "Where you from?" Different prices for different constituencies is SOP for B2B companies that have resellers, affiliates and distributors that receive one set of tiered prices and their own customers with price histories, which might need to be honored in special cases when customers order directly from company headquarters. Other challenges of multitiered pricing include offering tiered pricing for volume buys, fulfilling price commitments from staff, offering and applying discounts and incentives and even handling complex pricing formulas through proprietary apps and manufacturer and associate links.

The B2B business model is moving away from one supplier selling to many stakeholders toward website platforms where many stakeholders sell products and provide links for customer convenience, and each of these can generate its own complex pricing structure, product catalogs and SKUs. Customization is the only practical way to synchronize all these pricing options and still provide automatic ordering convenience. Customized pricing offers the following conveniences for customers and B2B eCommerce companies:

- Ability to assign membership levels for customers, distributors and resellers
- Segmenting audiences for different pricing tiers
- Applying discounts and incentives

- Updating prices in real-time quickly and universally
- Honoring commitments made by staff, affiliates and distributors
- Offering special prices for linked associates
- Rewarding loyalty with price incentives
- Managing store-within-store pricing
- Pricing products in global marketplaces where supply and demand forces vary

Fair pricing remains a fluid and malleable concept in the B2B industry, and decision-makers who want to build strong websites capable of managing complex multitered pricing models need to customize their software accordingly.

Warehousing Products and Managing the Supply Chain

No two B2B companies -- or even branches of the same company -- move, buy, store and ship products exactly the same way. Out-of-the-box software without customizations simply can't handle all the variables of modern B2B logistics and supply chains. In fact, entire industries and software applications have developed to handle supply chain management, project management and dealing with changes -- both opportunities and setbacks -- caused by rapidly changing conditions in real-time. B2B eCommerce companies need to track inventory closely for availability, check on supplies, estimate fulfillment dates, price custom orders and collaborate with stakeholders and vendors in the supply chain efficiently and quickly.

Tracking Inventory

Keeping track of inventory in critical because it affects many stakeholders including customers who are ready to buy based on availability and those who are considering placing large or regularly scheduled orders. Inventory data can also trigger automatic reorders from suppliers and update information in resellers' and distributors databases' or collaborative dashboards. Dates for resupply depend on vendor supplies, lead times for production, shipping times and other factors like natural disasters that reroute traffic or affect availability of materials.

Choosing the Best Internal Resources

Each large order also generates internal decisions about which warehouses to choose for order fulfillment based on real-time information about their inventories, restocking times, shipping conditions, seasonal demands and other complex logistics considerations. Companies might need to split-ship orders, estimate best-case and worst-case delivery times and provide shipping dates for custom products and fabrications.

Procurement and Sourcing

Each company also needs to manage the links in the supply chain that it owns and to connect with outsourced vendor fulfillment partners and materials suppliers. Managing the process involves ensuring production for internal inventories of products in one or more catalogs , generating and updating sourcing agreements, integrating shipping notices into the operating system, facilitating delivery notifications and managing inspection certificates.

Customer Notifications

Customers today also want to know about company supply chains before placing orders because their own customers have many concerns about the environment, ethical sourcing, manufacturing transparency and sustainability. A fully customized supply chain management feature can provide information to customers directly through the websites and generate notifications when suppliers, vendors or supply chain details change. Customers can look for parts based on serial numbers, study materials and request special fabrications based on supply chain information.

Managing the supply chain requires custom capabilities from eCommerce software. The more advanced and customized the software's capabilities are, the better the customer's experience will be. Few areas of business offer more ways for companies to build customer loyalty than fostering greater product visibility through intuitive software solutions that manage B2B warehousing and product supply chains.

Facilitating Seamless Vendor Fulfillment

Vendor fulfillment generates many challenges for B2B websites. Many eCommerce companies expand their inventories by selling products that they don't actually manufacture or stock and rely on vendor associates, manufacturers, distributors and fulfillment companies to ship these products when orders are received. It's entirely possible to operate a B2B company without stocking any products, but most organizations just supplement their product lines with outside products or additional sources for their regular product lines. These outside vendors ship products directly from their warehouses, so these external supply chains generate website issues that mirror in-house supply chain management.

Orders might require drop-shipping for all or part of an order, and the rest would ship when available based on the outside vendor's inventory and shipping policies. The essential back-and-forth communications necessary to generate seamless experiences for customers benefit directly in proportion to how customized one or both parties' eCommerce software operates. Customers still want to monitor the delivery process and supply chain, and eCommerce companies want fast alerts when problems develop. Limited eCommerce software could aggravate any fulfillment and shipping problems by complicating returns and refunds and generating branding and trust issues when packaging is mislabeled, packing slips are inaccurate and back orders are involved. Customized eCommerce software can mitigate these risks by offering:

- Better coordination between vendors and eCommerce companies
- Custom dashboards to manage the process
- Electronic information-sharing on supply chain information
- Clearly defined responsibilities for each party that are carefully monitored
- Ability to leverage each partner's on-boarding processes
- Automated file integrations
- Providing a variety of shipping options and ways to monitor them

Customizing software for drop-shipping applications could return strong cost-value benefits to eCommerce companies by allowing them to expand their product lines without the associated costs of manufacturing, warehousing and storing inventory.

Managing Invoices, Billing and Credit

Managing invoices, billing, payments and credit is no longer a standardized process due to proliferating payment options such as digital wallets, direct fund transfers, global payments, in-house credit, purchase orders, currency conversions and credit card transactions. Business customers want quick access to past invoices online to review prices, products ordered, payment histories and account balances. Split-shipping and drop-shipping options further complicate getting a picture of where clients stand.

Large wholesale buyers might receive lines of credit or require EDI access where purchase details are electronically exchanged between ERP systems. Most B2B companies offer more ways to pay for orders than just credit cards, PayPal or checks. Large orders almost always require a purchase order, and some products are tax-exempt while others are taxable when businesses use the supplies and products in their business operations instead of reselling them.

Flexible payment options are increasingly in big demand, and managing all these transactions becomes almost impossible without software customizations. Even the best off-the-shelf software won't have built-in functionality for payment options that didn't exist when the software was developed.

Managing House Accounts

Most companies offer their best customers credit terms or flexible payment options, and customized software can handle tasks like registering new customers, generating secure forms for credit applications, running credit checks and authorizing lines of credit.

Quoting Custom Prices

Most B2B companies find that their customers today want greater influence in designing products to satisfy more demanding customers. People don't just buy products based on price but research functionality, materials, safety, environmental concerns and other benchmarks before buying. A robust eCommerce company might have hundreds of customers wanting thousands of custom products and prices. The old way of doing business made pricing these complex orders extremely challenging and often involved consulting executives highly placed on the chain-of-command. Customized software can simplify pricing by automatically drawing data from manufacturing, inventory and the supply chain to facilitate pricing orders for special circumstances.

The right customizations for software applications to facilitate price quotes can increase sales, drive customer satisfaction and simplify the administrative tasks of approving and processing these orders. Custom-pricing software features or back-end integrations of QPC software offer the following B2B benefits:

- Promote a step-by-step custom-pricing process where every variable is addressed.
- Guide customers through the quoting process.
- Provide a range of recommended product customizations or fulfillment options.
- Connect customers with 2-D and 3-D CAD-imaging tools.
- Document the process to prevent misunderstandings.
- Get the latest prices of materials, labor and shipping costs.

Depending on their product lines, niche markets and other variables, decision-makers can customize the standard quoting functions in their eCommerce software or integrate with more complex QPC software to generate a vibrant alternative source of income that promises substantial growth as more business customers demand special products tailored to their needs.

B2B eCommerce & Integrations Offers Tips on Fortifying Core Business Features

Core business features are often taken for granted by B2B decision-makers who still support the older model of building relationships through personal contact, negotiating deals on a case-by-case basis and keeping business strategy confidential. B2B eCommerce & Integrations can help you achieve all your business goals in the way that you like to do business but with modern tools for an evolving B2B customer who demands greater functionality and B2C-type design features. You don't need to sacrifice security or proprietary information by upgrading your core business functions online; you just move your business to a higher level of sales and influence in an increasingly competitive marketplace. Our team of experienced, professional and collaborative engineers can work with your programmers to create a platform that increases conversions, promotes your brand, empowers your stakeholders and delivers an astonishing user experience to each customer and associate. Call or contact us today to see how we can fortify your core business functions with intuitive customizations and integrations that raise your game to a higher playing field.

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Custom Business Features Deliver Extraordinary B2B Versatility

Custom business features become increasingly important for successful and efficient B2B marketing because there are many business models to satisfy, and no business within a category operates identically or needs the same features. Some companies support B2B and B2C commerce on the same platform while others function as facilitators for E-procurement product purchases and bids. Other B2B models include infomediary websites, niche markets, heavy equipment wholesalers and many other industry-specific B2B operations. Many companies sell products in multiple countries and have website support for multiple languages, currencies, tax-calculation methods like VAT and customs-documentation needs. Out-of-the-box software without customizing its core business features just doesn't provide the level of service that customers expect, and even customized core features can fall short of what well-designed custom features can deliver.

Custom B2B eCommerce features -- regardless of business model -- deliver the latest products, research and information to customers and transform websites into central repositories that can display the right information to the right customer at the right time, which has always been the key to sales closings, and provide astonishing levels of user functionality so that people can research products, personalize their website interactions and connect to support services and external resources. Customized eCommerce websites can manage operations smarter and faster, synchronize information across operations and connected channels, gain valuable leads and information about their customers and deliver a personalized experience to each site visitor. The key to success is customization, and there are thousands of possible ways to customize a website's capabilities. Some of the most common and popular B2B eCommerce customizations include these seven transformative features:

1. Product Configurators to Manage Custom Orders

The best custom features for B2B eCommerce include integrating various user-friendly tools for handling complex ordering situations such as using product configurators to help customers order or specify options in custom-assembled or custom-built products. Examples include offering embroidered logos, custom color choices, dimensional changes and other fabrication options. Configurators offer the following B2B benefits:

- Providing guidance to customers who are ordering complex products with multiple options

- Satisfying buyers who want singular versions of products as Unique Selling Points
- Empowering production and assembly stakeholders with specific product blueprints
- Managing made-to-order and build-to-order products more efficiently
- Eliminating errors due to miscommunications
- Ensuring compatibility and functionality in custom fabrications
- Generating rich data for products including product codes, order information, changes to assembly instructions, CAD files and submittal information
- Precluding dangerous combinations of materials or designs with engineering vulnerabilities
- Preventing combinations that result in product incompatibilities
- Disseminating specific instructions to all the relevant manufacturing, warehousing, administrative, distributing and shipping stakeholders
- Integrating specifications with CRM, ERP and IT infrastructure
- Interfacing with company catalogs and CPQ software for pricing

It's easy to see how this custom feature helps to capture existing engineering knowledge and key business processes and deliver those insights directly to customers during the buying process. Custom features like configurators, price-quoting applications, simple product widgets and CAD modeling tools can deliver big sales increases, reduce errors, speed ordering processes and generate user-friendly price quotes and proposals while automating connections with support processes across the company and those of its business associates.

2. Tools for Processing Custom Orders

Automating order fulfillment is one of the core business features that every kind of eCommerce software delivers, and core customizations add many expanded capabilities. However, some websites need even more complex features for back-office customizations. For example, consider the complicated situation of customers who order complex product configurations or custom-made products using a configurator. This scenario could easily stop automatic fulfillment while decision-makers approve pricing and product design. Executive editing might even be required to determine if standard tier rates, discounts and incentives apply. Custom business features can handle these processes based on highly configurable guidelines and send an order everywhere it needs to go, which might include a company executive, sales staff, in-house manufacturing department, affiliated vendors and internal cost centers where costs can be tracked based on product materials, labor, shipping costs, etc. Shipping and handling charges also change when custom products are built, so shipping costs need to be updated through multiple delivery carriers and options.

Once prices are approved, any changed specs return to the customer for approval and order confirmation. Automating these processes for hundreds or thousands of custom products saves time and money in processing costs and prevents losses due to customer impatience in getting a decision. After all approvals are secured, the order can proceed to fulfillment. This complex journey can be highly automated so that customers can get answers almost instantly for common customizations. Highly original products or those that require unusual materials, structural changes, executive approvals or locating new vendors could take considerably longer, but customizations accelerate all the applicable processes.

The right customizations when processing custom orders might even include offering electronic data exchanges with the customer when multiple buyer decision-makers must sign-off on the order. One researcher found that 70 percent of all B2B decisions involve at least two decision-makers and that 30 percent involve more than five parties.[1] Customized features can manage all aspects of getting custom orders approved, forwarding orders to all involved stakeholders, separating parts of orders for immediate shipment and updating delivery dates for the custom-made products.

3. Facilitating Multiple Shipping Options

Shipping orders are one of the most important services that B2B companies provide because many organizations don't even manufacture, stock or warehouse their own products. Unlike B2C websites, which also offer multiple shipping methods, B2B businesses offer expanded shipping methods, multiple carriers for the same shipments, warehousing products between carrier pickups, split-shipping to multiple destinations and drop-shipping from affiliated vendors. These challenges enormously complicate shipping management and abilities to track orders, calculate costs and hidden handling fees and choose the right shipping carriers for global shipments that could involve sending products to underdeveloped areas. The shipping-related tasks that custom business features can solve include:

- **Integration**
  ERP and CRM systems integrate seamlessly with the eCommerce stores and catalogs, affiliated vendors, distributors and freight carriers to deliver real-time shipping costs and delivery dates.
- **Overages**
  Overages are updated and applied for weights that exceed estimates, size specifications that exceed guidelines and palette charges when more are needed than anticipated.
- **Cost Breakdowns**
  Customers can get a clearer picture of shipping expenses by viewing detailed costs from multiple carriers to help them choose shipping strategies.
- **Split-Shipping**
  The right custom integrations simplify shipping to multiple stores and tracking and confirming deliveries to multiple locations to fulfill a single order.
- **Drop-Shipping**
  Drop-shipping complicates the process because outside vendors handle the shipping, and every problem that confronts in-house shipping also applies to the vendors. Custom features

enhance communications so that eCommerce companies can better monitor external drop-shipping.

- **Order-Splitting**
  Customers might choose to split their orders and receive part of their order immediately and the rest through drop-shipping or backordering. Automation allows companies to set up order-splitting and alerts when each part of an order ships.
- **Custom Handling**
  Delicate, perishable or fragile products might require special shipping and handling, but extra fees apply for items that require refrigeration, delivery notifications, lift gates for unloading and other protective measures.

The right custom features mitigate a lot of the common problems associated with managing multiple shipping options. Automation optimizes essential administrative work, decision-making and monitoring required to ensure smooth, reliable shipments, but staff can always check on the progress of shipments throughout the cycle. Customers enjoy more options to curate and monitor their own shipping arrangements.

4. Managing Split-Shipments

Although split-shipments have been touched on in the previous section and the core business features chapter, custom integrations designed exclusively for split-shipments provide many benefits to B2B companies because thousands of buyers buy in bulk and ship to multiple store locations. The easier the process of ordering split-shipments, the happier customers will be.

Split-shipment software integrations can deliver custom reports to each location, connect with fulfillment departments and authorize putting custom labels on products. Software remembers all the store addresses and commonly received products at each address and automates the process so completely that buyers can easily place split-shipment orders on their smartphones. The right customizations can even specify different shipping methods for each location so that buyers can save on shipping costs or speed deliveries to locations where faster resupplying is needed.

5. Dashboards for Customers and Collaborative Partners

Almost any eCommerce software allows customers to log-in and view their accounts and ordering histories, but B2B companies must offer their customers greater access to stay competitive. B2B eCommerce customers like to research products in-depth, access information about the supply chain, view past orders, invoices and price quotes, consult favorites lists, check for special deals and incentives and get access to address books to contact staff specialists directly. One of the most useful custom business features for the B2B industry is the custom dashboard, which can be used by customers, affiliates, vendors, marketing staff and other stakeholders to gain accelerated access to authorized website functions, manage those functions in one place, generate customized forms and perform many other collaborative functions.

Most B2C sites will allow their users to log-in to view their past orders or track their purchases. But a B2B dashboard goes further by optimizing functionality and the user experience. Viewers can access not only past orders, but quotes and invoices, personal and corporate address books, custom favorites lists, customer assistance forms, special deals for partners and much more. Dashboards not only simplify and codify partner access but also deliver strong value to users who can more easily manage their communications and functions within eCommerce websites. Forrester Research reports that its survey of Chief Marketing Officers found high levels of support for digitally empowering buyers, stakeholders and marketing professionals with features like custom B2B dashboards.[2]

6. Assigning and Managing Access Roles

B2B customers function as de facto partners with their suppliers, and savvy decision-makers understand how important it is to empower customers in today's digital ecosphere. Custom business features allow B2B eCommerce suppliers to accommodate multiple users throughout their customers' organizations. There might be purchasing agents who must approve each order, and as mentioned in a previous section, more than five decision-makers are required to approve large orders in 30 percent of B2B orders. Custom features allow eCommerce to assign and manage different levels of access to customer representatives who might include:

- Purchasing managers
- Sales staff
- Store managers
- Executives
- Safety consultants
- Legal counsel
- Advertising and promotional personnel
- Human resources staff

The first step of the process is providing default roles to the customer organization, and system administrators can set up automatic roles within each of these parent organizations. The access level of each role can't exceed the customer's default access but can include as little or as many of those permissions as warranted. Most companies assign access based on these categories:

- Technical operations
- Operational access
- Customer service
- Marketing
- Business relationship
- Product merchandising and management

These access roles for client organizations can also be limited to certain areas within the scope of the category, and B2B companies can use these access-granting templates for customers, internal staff, outside vendors and business associates. The same access levels can also be built into partner dashboards for easier management.

7. Curating Content and Managing SEO

Both on-page and off-page SEO are critical for raising eCommerce website profiles with generic search engines, and creating unique content raises authority rankings and attracts influential links that allow marketers to engage their customers throughout their digital journeys. Custom business features can manage critical coding functions such as ensuring that each area of eCommerce websites and on-page and off-page content are properly coded with Meta descriptions and unique title tags. Custom features can even automatically generate description tags directly from the content and write code for page names, shortened and easy-to-remember URLs, page titles and other instances of SEO-friendly code.

These automatic coding features include using anchor text for extensive product catalogs, optimizing internal navigation and generating snippets of information when customers hover their cursors overs images and links.

Managing In-App Searches

Many B2B eCommerce companies are creating proprietary apps to foster loyalty and further simplify ordering and communications. The annual Mobile Path to Purchase study finds that 46 percent of all consumers use their mobile phones to research products and make purchases and that desktop use for these same tasks has dropped 14 percent between 2013 and 2015.[3] B2B eCommerce companies can leverage several opportunities that relate to this trend. People with mobile apps on their devices often conduct Internet searches from within the apps. Custom business features can manage these searches by optimizing proprietary apps for external content searches, providing ways for outside searchers to download the apps and monitoring customer browsing habits while they search the Internet within the apps to gain market-segmentation and buyer-behavior data. Creative programming can even duplicate the common B2C practice of using geolocation data to personalize marketing messages and content delivery.

Custom Business Feature Tips from B2B eCommerce & Integrations

Our programmers and engineers at B2B eCommerce & Integrations are always looking for the next big idea, creative application, bug fix, workaround and synchronization strategies that will keep your website at the top of its game. Our team works with a vast group of open source engineers, app developers, creative thinkers and established experts in website programming, and we'll work with the same collaborating skills with your IT staff to develop custom business features for your website, industry and specific B2B business model. Contact us today for answers to your questions or a comprehensive consultation about transforming your vision into customized code that delivers the benefits you want for your eCommerce business.

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Back-office Core Features Build Business Reliability

It's not possible to build a great B2B eCommerce website unless back-office systems integrate or synchronize with front-office. These accounting and monitoring functions in B2B companies are often less robust than those used in retail industries because there are fewer people and customers to manage. However, customizations and full synchronization with front-end features boost overall sales and business efficiency, allow customers to access relevant account information, promote marketing and optimize collaboration with third-party and custom-developed management applications. Managing business associate relationships is a front-office job, but the information often affects back-office management across the organization regardless of whether a B2B company has limited back-office infrastructure or a huge retail and wholesale operation. Depending on a company's specific needs, custom integrations of core back-office features allow ERP, management apps and marketing efforts synchronize through a sophisticated API layer to streamline efficiency and provide customized marketing and customer relationship management duties in the digital environment.

Organizations that have limited back-office software can add the capabilities that larger, enterprise-level clients use, and larger clients can fine-tune their operations for integrating marketing, proprietary apps and even more automation into their operations. Customizing core software features provides these business efficiencies:

- Managing complex supply chains for multiple products and in-house supplies
- Seamlessly synchronizing information across multiple channels including ERP and CRM software, marketing applications, accounting systems, inventory management, POS systems and call centers
- Speeding internal and external authorizations
- Allowing customers to access, download and pay invoices or interact directly with suppliers to negotiate bulk prices, check availability and research supply chain details
- Optimizing price quotes for large or custom orders
- Using information from product configurators to order supplies and authorize production and packaging
- Analyzing front-end information to segment customers and establish a lifetime value to each buying partner
- Handling credit card companies and other types of payment accounts
- Generating packing slips, shipping labels, backorder lists and real-time inventory counts
- Automatically assigning expenses against revenue such as commissions and consulting fees
- Reducing duplicated work by forwarding information to all departments and applications

The core back-office features provide these benefits and many more based on the type of eCommerce business, industry, targeted customers and geographic range of the business. Without integration and customization, any business faces extra work daily just to process the same transactions that automation can handle instantly. A clear example is needing to split sales information and enter separate figures in different databases. Depending on the level of online sales, this benefit of customizing sales entries is invaluable.

Analyzing Back-Office Needs

It's important to analyze back-office needs before customizing any software because there are many B2B business models with special needs such as Internet-only sales organizations that only need one-way integration and companies with brick-and-mortar and online sales, which require two-way integration. An example of the special needs of a company that offers brick-and-mortar sales might be the imperative of keeping the store stocked for local customers. Customization can establish the parameters of what's available online and what's not in real-time or when to override the formula to satisfy a valued customer. Regardless of business model, B2B back-office core features fall into four necessary functions: account management, purchase history, sales reporting and invoicing. The incredible array of business applications that these basic functions support include marketing, CRM, vendor management, Human Resources departments, reputation management, risk management, reward and incentive strategies, physical operations, payroll operations and many others.

Account Management Features

Account management includes financial accounting of every sale, operating expense, commission, supplies for goods and supplies for the business. Many B2B companies operate with QuickBooks, QuickBooks Enterprise or Excel spreadsheets, and others use ERP software that's divided into front- and back-office components. Most ERP software integrates automatically with financial accounting systems in the back-office, but customers with less sophisticated software can still use financial data in extraordinary ways to manage their inventories, fulfill orders more efficiently, ship orders faster, run automatic credit checks on new clients and analyze their businesses to uncover expanded business opportunities.

ERP and CRM Systems

Regardless of system software, customizing an online B2B eCommerce operation generates many challenges to ensure that shipping, product information, real-time inventory counts and customer-specific pricing information are always available to customers and staff, regardless of which mobile device they use, while preventing unauthorized access and data breaches. Large companies even face internal disconnects and barriers that customizing software eliminates. Companies can generate reports and manipulate data in custom ways to track and monitor sales by any benchmarks to address areas of concern, find new market opportunities, manage specific projects, improve financial compliance and drive improvements. Custom features include enhancing customer service by tracking billable data and relationships and automating core analyses of order-to-fulfillment, lead-to-data and procurement-to-payment processes.

Payroll and HR Management

Many companies use outside vendors or separate software to manage payroll and/or HR to simplify and error-proof tax- and report-filing processes. Some companies hire temporary workers, consultants, independent contractors or outside staffing agencies, but these de facto staff members must also be managed, and be able to access their employment records and relationship histories with the company. Customizations allow such features as self-management of records and onboarding to facilitate better HR management.

Custom Cloud Integrations

Integrating with cloud technology changes the way that many B2B companies operate by eliminating the need for back-ups and allowing stakeholders to access information from any authorized device or portal 24/7/365. B2B companies with customized core features can automatically update cloud storage and take advantage of the concept of only needing to enter financial information once.

Managing Employees and Resources

Custom core back-office features can address complex workflow and project management needs such as quality control, performance issues, analyzing digital processes for their workforce activities and cost-value profiles and tracking worker activities physically and online to allocate resources more efficiently. Administration becomes simpler when supervising strategies are assigned and monitored through mandatory checklists, self-service functions and other efficiencies.

Sales Reporting

Customizing sales-reporting figures of B2B businesses drives leads, product development, inventory management and less obvious benefits like better relationship and customer management. Synchronizing information from social media, business trends, product reviews and carefully curated sales figures provides these benefits for B2B eCommerce companies:

- Using custom dashboards and managing access to empower customers, associates and business stakeholders
- Staying updated throughout the company with custom business forecasting reports, both internally and externally generated
- Tracking sales team performances
- Generating leads from buyer behavior
- Qualifying prospects automatically and obtaining critical sales information such as determining the names and contact information of key decision-makers, how to get around sales-call blockades, discovering which competitors buyers use and finding BI on their current product lines and marketing strategies
- Analyzing key metrics information from any device and location
- Studying Web-based resources and social media to track competitors
- Managing customer service more efficiently and proactively
- Following sales prospects through the buying process

Generating Sales and Leads

Custom core reporting features allow B2B teams to adjust marketing strategies, initiate content campaigns to boost sales and address buyer concerns, send automatic marketing messages based on customer ordering histories and track website visitors through widgets or built-in software features. Each visitor to a B2B website provides valuable information even if the person quickly leaves. That might mean someone came to the site by accident or an inappropriate link or that the visitor didn't like what he or she saw. Tracking visitors can help companies adjust their on-page and off-page content creation and website design or provide detailed information about that prospect as a sales lead for the staff.

Electronic Discovery

Employee activity might occasionally be monitored by law enforcement or staff to guarantee regulatory compliance and ethical behavior, find evidence and track data breaches to their source for HIPAA compliance. Security is a big concern for B2B companies, and having core tracking tools for eDiscovery complies with regulatory agency guidelines, strengthens internal security and provides electronic trails for evidence in criminal proceedings.

Managing Purchases

B2B companies that sell extensive products, represent manufacturers and sell items at both physical locations and online have more complex inventory-management and ordering needs. Core back-office features usually update availability data but seldom manage complexities such as keeping the showroom stocked, answering customer questions about the supply chain and collating materials used in manufacturing or assembling products to take advantage of bulk ordering discounts and customizing or building products for customers. B2B companies can ignite sales by using product collaborators, but this often generates problems for the back-office staff such as pricing special orders, getting approvals from various stakeholders, ordering products and materials or locating new vendors.

Supply Chain Management

Special features allow managers to compare POS intelligence, BI, vendor prices and options, supply chain logistics and customs-clearance needs. Companies with physical-location sales or different websites can compare reports, inventory, supply chain characteristics that affect customer buying decisions and other metrics. Custom supply chain management tools include container management, landing costs, warehousing strategies, logistics and storing options when shipments are idle, managing distributors and customs duties and many other B2B needs.

Maximizing Profitability

The key area of concern for any B2B company is profitability, and managing inventory, reducing theft and waste, getting better prices for products and materials and negotiating better deals are key ways to maximize profits. Custom management for business purchases can include automatic profit projections broken down by product, materials, vendors, suppliers and other benchmarks to enable better control of costs. Another key area of profitability where customizations are important is covered in the next section on invoice management and accounts receivable.

Invoicing and Accounts Receivable

Managing all accounts receivable and invoices through automation and back-office software features frees time for staff, prevents disputes proactively by documenting every charge that's billed to clients and generates big returns on the development investment in as little as two months. Companies can reallocate resources away from collections activities and focus them on value-added tasks. Just a few of the possibilities of customizing office software features include the following areas:

- **Customer Access**
  Providing customer access to past invoices, price quotations, ordering histories and product features improves customer satisfaction.
- **Price Quotes and Custom Prices**
  Thousands of price quotes, custom prices, pricing tiers and incentives and discounts can create a vast body of applicable material to match to each customer. If customers call or order online, they'll be upset if they don't get the prices they were promised without contacting someone in customer service. Quotes can easily be lost or misplaced, which could easily be a deal-breaker for a customer. A special features can create a searchable database for pricing tiers, price quotations and estimates.
- **Instant Invoicing**
  The right customizations enable instant, tailored invoice-generation for customers that include custom quotations, pricing and any applicable discounts. Customers can manage their invoices and ordering with custom reports or even from a dashboard, which leads to faster payments, fewer defaults and better cash flow and higher profits,
- **Collections**
  Reports can monitor whether each customer has paid, how much is still owed and payment histories so that staff can forecast payment problems and initiate collection efforts. Automatic reminders and emails can be sent at certain times, or staff involvement can be triggered at different times for each customer based on special criteria.
- **Tax Reports**
  Customizable tax reports not only benefit a B2B company but also provide a valuable service to customers.
- **Flexible Revenue Scheduling**
  In some cases, it might be beneficial to schedule regular payments for sales that have unusual billing requirements. Companies might not want to invoice some of their better clients immediately to delay taxes for the current tax year and other reasons.

Tracking Billables and Expenses

B2B eCommerce companies typically maintain hundreds if not thousands of partner-client relationships, and tracking billable hours, services and expenses manually proves time-consuming and prone to accidental and deliberate errors. Software customizations can automatically track time, costs, supplies and sales for each customer and their stakeholders, generate custom expense reports, provide taxable and nontaxable breakdowns of purchases and work with all types of billing models. Companies never need to risk under- or over-billing because timesheets aren't handy or staff members inflate their own time and expenses, which could cause the business to lose good customers.

Integrating Third-Party Add-Ons and Apps

Regardless of the back-office needs, companies often want to integrate custom apps to manage back-office applications. Integrating these apps into the API layer of eCommerce software can automate complex decision-making, simplify access to relevant information, target specific cost-reduction strategies and integrate seamlessly with existing ERP software. Back-end apps can reduce service calls, educate customers, run promotions, deliver customer information, generate sales leads from existing data, track shipments and process product returns.

Tips on Back-Office Core Customizations from B2B eCommerce & Integrations

You might not realize just how valuable your back-office system is for achieving your B2B marketing, sales and management objectives. At B2B eCommerce & Integrations, our teams work with your programmers to optimize your eCommerce marketing at every level, which includes back-office integrations and customizations even if you use QuickBooks or Excel spreadsheets for inventory and financial reporting. If you have an ERP system, we can fix any bugs or integration problems you're having and recommend new custom features that will save time and money, optimize marketing efforts and increase customer loyalty. Call or contact B2B eCommerce & Integrations for a consultation or a price quote for a simple fix or major overhaul.

Back-Office Custom Features Drive Versatile Business Goals

Back-office custom features allow companies to craft native user experiences for each customer, drive internal management efficiency, nurture sales leads and achieve other business goals. One of the key benchmarks for modern B2B websites is to enable omnichannel back-end integrations that deliver fully integrated collaborations with third-party resources and industry and company-specific stakeholders such as vendors, distributors, Web services providers, shipping carriers and others. Back-office customizations save customers and staff time and money by accessing back-office and front-end data, connecting with external business resources, fostering better customer personalizations and optimizing marketing applications.

Benefits of Custom Back-Office B2B Features

B2B customers increasingly demand user experiences that mirror B2C website designs and technologies, and the eCommerce landscape evolves constantly with new products, company mergers that introduce separate ERP systems and increased demand for the latest functionality features such as optimized internal searches, greater product-researching capabilities, in-house tools to reduce costs and procurement integrations. Customers demand greater leeway to customize and configure products, connect with third-party suppliers, vendors and company stakeholders, access their records from mobile devices and use intuitive features to place orders. Back-office customizations handle these and many other business initiatives and help to build an enterprise-level eCommerce platform that satisfies multiple business stakeholders.

In-depth studies of targeted B2B focus groups found that customized user functions in B2B websites were the most desired feature of B2B customers and that users from all age groups cited usability as the leading influence in visiting websites and placing B2B orders.[1] Customers felt that B2B sites were substantially less user-friendly than their B2C counterparts, but most respondents were influenced by B2C usability in assessing B2B sites. One comprehensive study on B2B usability found that functionality trumps other considerations and that B2B customers visit websites with specific plans in mind such as finding prices 43 percent of the time, accessing technical details in 38 percent of visits and consulting case studies and white papers in 38 percent of website trips.[2] Anything that distracts visitors from their purposes can cause them to quit the site according to 93 percent of visitors. That's why customizations and buyer segmentation are so important in B2B eCommerce. Key areas for back-office integrations include the following sectors:

1. Superior Inventory Management Through Custom Integrations

B2B Vendors often manage their inventories through Inventory Management, Product Information Management and other back-office applications that include simple spreadsheets and ERP software. A flexible, dynamic eCommerce platform needs to handle inventory from multiple product feeds, purchase orders, brick-and-mortar sales, showroom display needs, sales staff demonstrations and retail sales, if applicable, to update inventory figures, trigger automatic reorders and integrate with customer features to inform them of inventory counts and anticipated restocking and shipping dates.

Centralized control and synchronized updates in real-time are critical and among the most useful of B2B customizations. Customized inventory management consolidates sales orders across an organization, improves productivity, speeds restocking and reduces order-to-cash cycles to improve cash flow and customer service. The benefits that customized inventory management can generate for business include the following advantages:

- Sharing information through Electronic Data Interchange or EDI protocols
- Synchronizing data from multiple channels
- Empowering outside sales staffs with access to real-time inventory figures from their mobile devices
- Generating custom reports for any combination of products to drive sales efforts
- Selling products with confidence in meetings, trade shows, sales calls and demonstrations anywhere in the world
- Recommending personalized product suggestions based on immediate availability

2. B2B Integrations with Third-Party Associates

Developing and implementing associations with third-party service providers and open source applications can help any B2B company build a 360-degree eCommerce platform that's completely scalable, responsive to trends and convenient for collaborations. That's one of the key characteristics that distinguishes a robust platform from out-of-the-box software and B2C applications. These custom integrations can include sales tax formulas for multiple states and countries, shipping integrations with UPS and FedEx and custom features for verifying LTL carriers that ship large equipment and products. Custom integrations can also connect with financial companies like JD Edwards Implementations or HP Financials for B2B companies that have complex back-office accounting needs where intuitive management solutions could foster better efficiency and control of manufacturing processes, industry-specific best practices in accounting and asset-intensive multiple projects.

Back-office customizations facilitate hundreds of B2B customer and associate relationships because everything a business does draws information from company records or is reflected in accounting. However, regular software -- no matter how advanced -- requires businesses to make adjustments. Customizations perform these adjustments automatically within the back-office software's middleware layer so that B2B operations aren't continually disrupted.

Connecting with Vendors, Suppliers and Distributors

Best practices for B2B platforms involve connecting with as many suppliers, vendors, niche manufacturers and information resources as possible to provide better customer engagement and a greater range of service and product options. Customers can interface directly with these associates when companies routinely and securely exchange information through electronic data exchanges (EDI), API integrations, FTP or REST/SOAP-based Web services and other protocols. Working with a skilled eCommerce platform developer, companies can customize applications using the most beneficial method of directly exchanging information. That enables customers and staff to research products and supplies, supply chains, MSDS information, company backgrounds and other key intelligence for informed decision-making. The benefits of establishing direct, custom connections include:

- Assigning attributes for internal and external product searches
- Supporting real-time payment authorizations
- Configuring product descriptions for catalogs with details like measurements, specifications, features, etc.
- Enabling customers to conduct their own research
- Confirming shipping options with one-click efficiency
- Handling and supporting administrative decisions on bulk pricing, sales discounts and coupon processing
- Tracking shipping through multiple carriers
- Getting confirmed information directly for advertising and promotional campaigns
- Associating multiple shipping addresses to a B2B customer for split-shipping among multiple carriers
- Managing supply chain visibility, third-party logistics and fluctuating inventory levels at warehouses and distributor locations
- Estimating inventory and assets more accurately and integrating them into charts of accounts and financial reports to provide a more complete picture of company resources

These examples cover just a few of the options and benefits of connecting with third-party suppliers. No matter how extensive B2B online sales may be, adding automatic third-party connections increases sales and customer satisfaction and generates cost-value benefits. Companies can add customizations like these gradually to suit their business plans and evolving customer buying behaviors.

Installing and/or Integrating with CRMs

B2B customers can easily install or integrate customer relationship management systems into their front- and back-office eCommerce platforms. Many of these systems are open source, but it takes a team of skilled IT developers to integrate CRM software seamlessly with back-office systems. In B2B operations, CRM can be an invaluable tool for hooking into financial systems to track earnings and costs associated with a customer and providing details on leads and sales prospects to predict a prospect's future needs and the appropriate sales strategy to use. B2B companies can install open source CRMs with just a few technical requirements, but what they make of the software depends on their IT teams' skills in integrating and customizing their eCommerce platforms to provide company-specific tools for creating, curating and nurturing customer relationships.

Speeding Payroll Processing and HR Management

Direct connections with third-party payroll services simplify managing staff in multiple jurisdictions and allow workers to on consult employment records, onboard information directly and request employment histories and pay verifications with these payroll processors. Companies can also use this type of custom connection to enable hiring temporary workers and outsource HR functions, which is especially attractive for companies that maintain staff in multiple jurisdictions.

Vetting and Hiring Staff and Investigating Business Associates

Custom back-office integrations accelerate many routine investigations involved with hiring and vetting staff, checking references and conducting business investigations. B2B companies can establish secure connections through dozens of vendors in the cloud for customized and encrypted access to confidential information.

Qualifying Customers for Lines of Credit

Most B2B companies establish complex paying arrangements with their best customers, but any kind of delayed payment could generate substantial losses when companies can’t meet their payment obligations. Custom back-office features could include various ways to run credit checks, monitor customer creditworthiness and bill-paying history and allow new customers to apply for credit and supply vital company information that includes company officers, bank and trade references, bankruptcy history and personal guarantees from the business owners. Decisions to grant credit can be based on standard business credit ratings or credit scores and other considerations like public information, the company's willingness to earn credit and accept late fees and penalties and other factors that B2B companies can establish.

B2B customizations and integrations of third-party resources can empower any organization to generate real-time updates, reconcile and scale business solutions to complex challenges and foster greater visibility of related services to staff and customers. The digital ecosphere offers many open source applications, big data resources, SaaS third-party integrations and other connection opportunities through the API layer of eCommerce platforms, but custom development ensures that everything runs smoothly and aligns with company goals and B2B best practices.

3. Store-Within-a-Store Applications

Emerging thought leaders across all B2B business models understand how important it is to react to market demand, satisfy busy customers who search for products on their mobile devices and take advantage of segmentation to offer special catalog lists and pricing tiers to various sub-groups. Store-within-a-store applications can benefit a range of B2B marketing strategies that include offering more compact catalogs to special segments, promoting branded merchandise separately from in-house or generic brands, creating B2B stores within larger retail operations and satisfying other special marketing and buying needs.

These sub-brands can be used to provide deeper product specs and descriptions, offer special pricing or discounts, trigger automatic sales help with complex orders, include highly customizable products and target distinct subsets of customer groups such as local clients or customers from defined geographic regions. For example, sub-brand stores might sell air conditioning systems in tropical regions and snow-and-ice management products in colder climates.

Enhancing Functionality

Sub-brands allow eCommerce websites to engage their customers at deeper levels, provide special research tools, curate products for increased relevancy, offer personalized services and price products with built-in discounts.

Empowering Vendors

Vendors want to help resellers market and sell their products, but many want more control of how those products are presented, branded and described. B2B websites can deliver better compliance with vendor requirements while creating a better shopping experience for buyers by creating a sub-brand store to market products under an exclusive label with customized store designs and buying features.

4. Separate Client Stores for VIP Customers

Large eCommerce stores often depend on sales to VIP customers, and many of these buyers need higher levels of support than regular customers. VIP customers might need more detailed product research and vendor support services, special lists of preapproved products, custom pricing, flexibility to customize products, products from only name-brand manufacturers or built-in ordering limits constrained by individual store deliveries, budget caps, seasonal boundaries and confidentiality or security-compliance issues.

These special product lists could challenge any B2B operation and its staff to comply with all these special requirements. Back-office customizations can craft special instructions and catalogs or stores-within-stores that only display approved products and limit orders based on customizable guidelines. The companies can still order other products if approved, which often requires approvals from multiple decision-makers. These store customizations can offer the following automatic processes:

- Providing information on new products to all decision-makers to expedite approvals
- Limiting catalogs for easier ordering on mobile devices
- Generating customized screens when customers log-in to the site
- Displaying special images, features, videos and specifications
- Automating split-shipping features to multiple customer store locations

Back-office customizations can handle any set of store-within-store instructions and prevent errors in processing, billing, pricing, returns of merchandise and website displays. Custom apps and customer dashboards are other options for customizing VIP customer orders.

5. Choose Your Own Customization

The great thing about a customizable eCommerce platform is that decision-makers can choose from hundreds of common customizations or create something entirely original based on needs and opportunities. The best practices for eCommerce favor custom development that leverages the services of collaborative teams of engineering experts in an increasingly interconnected marketing environment. Changing business processes to accommodate software creates more problems than it solves.

Examples of customizations include offering multilingual support for global customers, customizing RMA or return-merchandise-authorization processing and supporting multicurrency conversions. Some B2B companies want automatic BI or business intelligence reports so that decision-makers never miss important trends or actions taken by their competitors. Other customizations might include social media monitoring, reputation management, service-oriented customizations or tools for monitoring software-as-a-service users and compliance issues for companies that sell SaaS to business customers. Examples of third-party B2B customizations include:

- Segmenting and profiling customers with advanced techniques
- Researching intellectual property
- Configuring custom products
- Automating price quotations
- Offering third-party financing
- Developing custom business apps
- Extending fulfillment obligations and risks to third-party suppliers and distributors
- Managing business risks
- Ensuring regulatory compliance
- Recruiting participants for usability studies
- Providing custom access, features and marketing materials to partners, dealers and franchises
- Managing staff and optimizing HR deployment
- Reducing waste, inventory shrinkage, theft and fraud at storage and store locations
- Generating content for blogs, industry websites and social media
- Preparing advocacy kits to persuade multiple decision-makers involved in buying decisions

One overlooked customization that typically provides real benefits but that B2B marketers hesitate to develop is asking customers for referrals, which seems to discomfort wholesale eCommerce strategists. However, research shows that 83 percent of satisfied B2B customers would be delighted to recommend eCommerce sites if it were easy to do so, but only 29 percent actually do.[3] That's because eCommerce companies don't ask for referrals or make it easy for customers to provide them. A customization that works through financial software and CRM could easily offer customers ways to share referrals and provide incentives for giving them and help B2B companies use those referrals in marketing.

The chances are that any B2B problem, opportunity or operating efficiency can be addressed with a customization or third-party integration. In-house IT teams and development partners can always hash-out the technical coding details of integrations and customizations for any B2B eCommerce business, but a general overview of the steps can prove useful to decision-makers when determining company strategy. The best practices for developing these customizations include the following points:

- Analyzing the back-office needs and front-office opportunities that customizations can satisfy
- Determining which B2B document protocol to use such as EDI (Electronic Data Interchange X12), OAGIS (Open Applications Group Integration Specification), UBL (Universal Business Language), HIPAA (Health Insurance Portability and Accountability Act), HL7 (Health Level 7), EDIFACT (Electronic Data Interchange For Administration, Commerce and Transport) and others
- Defining the documents and deploying them to metadata
- Customizing support for partner-specific types of documents
- Using third-party and open source modules to speed development
- Bundling Web services to build greater functionality
- Confirming information that originates from blogs and social media
- Determining what information need to be loaded in real-time and information that can be loaded asynchronously
- Testing customizations for errors and performance on multiple computing devices

Custom development -- while seeming complex and challenging for eCommerce companies -- can actually go smoothly when B2B companies partner with the right teams of engineers. The returns from customizations and third-party integrations can be enormous Best practices for customizing back-office software include collaborating with outside teams and using Web resources. As company needs and B2B trends evolve, websites might need upgrades, new iterations or new customizations, but working carefully with a trusted development partner to develop custom back-office features, front-end integrations and external connections can accelerate the process by identifying these needs and opportunities proactively. Choosing a robust and customizable B2B platform also facilitates the process of customizing back-office features, upgrading them and making any indicated changes.

Expert Back-Office Development Tips from B2B eCommerce & Integrations

Our experts at B2B eCommerce & Integrations understand eCommerce software applications from the front-end to the back of the house and are ideally positioned to work with your IT team to install, configure, integrate and troubleshoot customized back-office features that match your company's business model and operating processes. The beauty of having a customizable platform is that it's scalable so that you can add the features you want as needed or practical for budgetary reasons. Whether you need special management features for sub-brands, synchronization with shippers or other outside associates, exclusive catalogs and prices for VIP customers or differentiated management of product information or inventory, our team brings collaborative skills to the process of integrating custom back-office functions into your eCommerce platform. We can help you integrate CRM solutions, SaaS applications, local IT resources, distribution channels, retail or business store operations and supplier and vendor connections as needed. Call or contact B2B eCommerce & Integrations today to see how we can collaborate with your IT staff to code customized features to empower your business and customers.

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Design and Your Company's Reputation

As mentioned earlier. Harvard Professor Rosabeth Moss Kanter determined that people can make up their minds about websites within the first 50 milliseconds after arriving at a given site. Many of these impressions must occur subliminally to register so quickly, and they could be grossly unfair and inaccurate in their assessments of websites and companies. Welcome to the competitive world of B2B marketing. People -- even professional business buyers -- come with a full complement of prejudices, preferences of color and design and ulterior motives for visiting a website. If browsing customers don't find what they want within a short time, they'll just move on to another site. Fortunately, website owners aren't stuck with a static design or limited to the same display features when they carefully segregate the people who visit the site. Customer interfaces can be customized to generate personalized screen displays for different types of customers to reinforce making the best possible impression.

Design and functionality are inseparably intertwined, but many B2B companies haven't embraced the concept that their websites need to offer all the design features that B2C companies offer and empower customers and stakeholders to use their dynamic eCommerce platforms for more than just placing orders. Web design statistics reveal a number of interesting, actionable insights for B2B marketers. People not only respond to design but also judge a company by functionality issues as illustrated by a survey that found 47 percent of customers expect websites to load in two seconds or less. On average, websites have fewer than 10 seconds to tell their story and convince buyers to stay.[1] Customers make fast judgments based on key design features, and many of these are fueled by credibility and trust issues.

Boosting a B2B website's credibility is essential for long-term success. Business relationships can happen quickly over the Internet, but most buyers interact with a B2B company for extended times before placing their first orders. Stanford conducted research on credibility issues over three years and involving more than 4,500 people to develop the following best practices for B2B marketers:[2]

- Show customers that the company is real to boost credibility by using such strategies as posting office photos, customer testimonials, lists of influential clients (with their approval), professional memberships, etc.
- Show credibility by offering third-party support.
- Build content credibility by linking to reputable websites, and provide citations and references to source materials.
- Design a website that looks and "feels" professional, which means functional, uncluttered, easy-to-use and logically divided into sections.
- Make it easy to contact the company in multiple ways because about 51 percent of people complain about missing contact information on business websites.[3]
- Avoid any errors including typos, bad grammar, weird capitalizations, use of exclamation points and broken links.

- Limit or avoid showing other ads on B2B websites except for those of business associates and manufacturers.

The Internet makes it easy to interact with millions of potential clients, but those prospects usually don't know anything about the businesses they visit except what they infer from website design and credibility. About half or 48 percent of people cite website design as the main factor in deciding whether a business is credible, and 94 percent of people have mistrusted or rejected a business just because of design issues.[4] B2B eCommerce platforms face many challenges to develop the right approach for multiple stakeholders such as providing great user experiences, attractive and functional Web designs, interactive features, proper coding for navigation and SEO and better security and enhanced payment options for online transactions. It's critical to work with a development partner to take advantage of outsider insights, collaboration strategies, unbiased testing and support for developing a cohesive marketing and content strategy that's inseparably linked to design, credibility and third-party business integrations.

Mobile Devices and Design

Mobile devices are used by more B2B buyers to research companies and products and even to place complex split-shipping orders. Responsive Web design ensures that B2B website displays look attractive and function correctly for people using smaller screens. Google now penalizes companies that don't use responsive mobile design.

Preparing an integrated mobile marketing strategy offers B2B companies some startling advantages over their competitors because the technology is still relatively new and not fully adopted by B2B decision-makers who often support strategies that were more successful in the 1990s. Companies can generate multiple benefits and build credibility and long-term relationships from a wide-open field of prospects who are dissatisfied with B2B companies that don't offer B2C-type design and user features that are customized for mobile searches. The benefits of designing for mobile include:

- Gaining valuable customer behavioral data for profiling customers, leads and prospects
- Sending personalized marketing messages that reach decision-makers instantly
- Optimizing more frequent use of marketing support features like product demos
- Reaching customers at their greatest times of need

Mobile design is critical to establishing credibility with mobile B2B users. One study reported that about one-fourth of eCommerce professionals believe that mobile Web is an important customer channel, and 28 percent of today’s C-level executives use mobile devices to research business decisions.[5]

How Marketing and Sales Cycles Affect B2B eCommerce Design

If websites are the primary contact area for gaining new customers, it's critical to use that platform to nurture prospects, find and develop sales leads, convert customers through an expanded B2B sales funnel and deliver personalized content, relevant features and custom displays to each person that virtually walks in the door. Covering all areas of Website design features, user interfaces and user experiences could take hundreds of pages, but the condensed version is that design plays the main role in defining user experiences. Intuitive design is a phrase that's commonly used, but what that means is that design guides customers throughout their website visits, answers questions, enables people to research products further, connects visitors to third-party associates and entices visitors to "convert," which could mean to fill out a form, register, call the company, place an order online or watch a product demo.

UI/UX Strategies

B2B companies can manage website credibility issues by delivering better design features based on customer profiles, website behavior and demographic information. Each customer is routed to key areas of the site by the user interface or UI to generate better overall user experiences, commonly abbreviated as UX. The benefits of customizing the B2B experience of each customer are substantial, which the previously covered stats clearly show. More B2B decision-makers use mobile phones to research products and companies, and their impressions of credibility are often made in seconds. That's why it's important to anticipate what the customer wants, provide targeted displays based on their profiles and deliver a consistently relevant array of options during their online journeys.

Mapping the B2B Buying Process

Designers can't design relevant displays and feature options unless they understand each customer's profile and how it affects the buying process. Best practices for understanding the sales cycle and mapping a prospect's journey include:

1. **Developing Awareness**
   Each customer must become aware of what the company can do for him or her. If the visitor is a purchasing manager, showing an optimized purchase process is a big plus. Showing third-party options for research could also play an important role. If the buyer buys in bulk to distribute products to multiple retail outlets, an easy split-shipping process might impress the buyer.
2. **Helping Customers Evaluate the Company**
   Once aware of the company's potential benefit, buyers need the tools to evaluate the company and its products. Enhanced internal searches, testimonials, information about the company, prices, ability to place custom orders and other B2B options come into play.
3. **Converting Prospects into Customers**
   Once customers are leaning toward making a B2B purchase, the interface should operate like the traditional sales funnel by offering great shipping options, multiple payment options, clearly defined return policies and easy ways to place orders by self-service or triggering staff support. Of course, staff assistance can be triggered anywhere in the process with offers of automatic chats and other website features.

The website's information architecture is the single most critical element of design because it's used for internal and external searches to find relevant information. Mapping site visitors includes understanding each customer -- whether he or she is an existing customer, partner, business associate, staff member, new prospect, key decision-maker or secondary decision-maker or associate. Each visitor's journey should be customized based on information that becomes available in real-time.

Graphic Design Strategies

Most people think of color schemes, typography, font sizes, images and illustrations when they are considering website design, and these factors can be important when building a brand or adding personality to a website. However, B2B buyers are usually less concerned with these design elements than how design features work on their devices. It is critical not to distract customers with flashing bells, automatic narrations and motions that don't add value. Testing design elements is important to develop a consistent brand and concept such as friendly, sophisticated, practical, bold or conservative.

Using complementary colors can reinforce good impressions or turn away prospects in seconds, so take some time in developing a professional color scheme that reflects the company's image and satisfies classic color theory. Color preferences are highly subjective, but some combinations just don't work for most people. Textures and transparencies can enhance design, but they should be used sparingly and carefully for valid business reasons and not just for design aesthetics.

Building Trust in B2B Relationships

Credibility is enhanced by design features, and offering personalized displays and suggestions, relevant connections and product support features begins the process of building online trust and long-term business relationships. Many B2B analysts believe that price is the most important buyer consideration, and it certainly matters, but competing on price is a losing strategy over the long-term. Offering prices that are too low raises red flags to many experienced buyers who understand the costs and don't trust bargain-basement prices.

Savvy B2B marketers use their design features to build trust in customer relationships by helping each visitor achieve his or her objectives in visiting the website. Creating a favorable impression depends on professional site design, customer-centric features and third-party integrations that help customers build their own businesses. Offering customers consistently great user experiences builds relationships that are immune to competitor efforts to match or undercut prices or duplicate services.

A study of 75 top national B2B accounts showed that customer engagement was the defining criterion in gaining trust, building credibility and developing long-term, mutually beneficial relationships. About 21 percent of high-engagement businesses experienced 20-percent or higher growth rates while only 15 percent of low-engagement businesses achieved those growth rates.[6] As engagement becomes increasingly SOP in B2B marketing, decision-makers can expect that gap to widen.

Design Tips from B2B eCommerce & Integrations

At B2B eCommerce & Integrations, we understand how to incorporate cutting-edge design features into any eCommerce platform while integrating the special customizations and features needed to build a world-class eCommerce platform. Our people are skilled at working with multiple stakeholders to design, build, integrate and test each part of your website so that it can automatically customize experiences for a range of stakeholders and customer profiles. We would like to develop the kind of relationship that builds trust with our development partners, and we offer the skills, resources and customer-centric philosophy that convinces multiple decision-makers in your organization to begin extending trust. Call or contact us today for a consultation about any element of B2B eCommerce platform design.

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Best Practices for Designing and Customizing B2B UIs and UXs

User experiences are just as important to B2B customers as they are in retail marketing. The reasons for this evolving trend can be attributed to the growing use of mobile phones to access the Internet and increased online ordering by people of every age and demographic group. B2B decision-makers use their phones to buy retail products like other groups, so they've come to expect the same high-quality user features on business websites that they find in their B2C shopping experiences. User experience or UX or can be defined as everything that websites try to accomplish to encourage greater interactions between customers and business brands at various touch points along their browsing and buying journeys. B2B Companies can customize those journeys with special website designs, varying levels of functionality, interactive characteristics, architectural details for navigating through websites, high-resolution images, videos, apps and other features. Together, these personalized and targeted efforts comprise the User Interface or UI. The best practices for designing UIs and UXs depend on a company's products, demographic profiles of its customers and other people who actually use the site such as third-party vendors, resellers, distributors, purchasing managers, consumers, bloggers, social media members, etc.

Each website user might be a customer, company decision-maker, investor, employee, purchasing manager or even a company executive who's screening companies for a potential business partnership. It's critical to segment users to the best of a company's ability and to provide the features that educated guesses predict that visitor wants but with easy ways to correct any mistaken impressions quickly. People come to B2B websites for different reasons. An engineer might be looking for a part that's compatible with a certain brand of restaurant coolers while an executive or purchasing manager might be looking for bulk prices on dozens of products for a chain of retail stores.

The B2B Difference

B2B websites must satisfy greater demands than consumer-targeting websites for many reasons. Buyers use websites to connect with third-parties like shippers, vendors and distributors to research products, check availability and schedule deliveries of bulk orders. B2B customers also want access to details of their accounts, abilities to customize orders, access to valuable support materials and technical specifications and third-party contacts that help them choose and market the products that they buy. Buyers are also retail customers, so they can't help but be influenced by easy-to-use design features like those that they enjoy when shopping for personal goods and services. What this means for B2B websites is that their UI and UX designs must be highly functional and as well-designed and personalized as those of B2C sites. That could mean providing a very different interface and experience for a children's clothing manufacturer than for a supplier of fitness equipment that interfaces with hospitals, clinics or physicians for biometric monitoring.

Delivering a personalized and satisfying user experience to each customer is the major benefit of customizing a B2B eCommerce platform. Intuitive websites answer customer's questions before they even formulate them. Everything that each visitor sees and does on the site should reinforce the user experience with the right language, ideas, graphics, navigation architecture, automation features and responsive screen displays for ease of use. The first steps of customizing interfaces and experiences to match multiple customer profiles and enable collaborations from staff, vendors, shippers and other site stakeholders involve researching customers and users, setting business goals, determining how websites are used and creating the best possible experience for each user profile. B2B organizations customize their sites in up to seven languages and provide easier navigation, enhanced search features and personalized displays to satisfy customer demand. Statistics show that 76 percent of B2B buyers want enhanced ways to search for products and that 75 percent of them are influenced by social media and their personalized approach to marketing.[1] An astonishing 91 percent of users want automation features.

Statistical Support for B2B Design Strategies for UI and UX Features

One of the key marketing trends that affects B2B companies is that designs are becoming more personalized and adapted to individual users. That means customers see different screens when they log-in to websites or applications, and company stakeholders get very different sets of features and custom dashboards to manage administrative functions and collaborations. This highly personalized approach is essential because statistics suggest that 89 percent of businesses will compete primarily on providing better customer experiences over the next few years and that by 2020, customers will manage about 85 percent of business transactions without help from staff.[2] More than 90 percent of buyer decision makers feel that good user experiences are critical to the decision process, and 92 percent of B2B companies that support developing designs for better user experiences also support providing multiple contact channels on their websites. In 2015, 78 percent of organizations are trying to distinguish their businesses from competitors by customizing user experiences.

1. User Interface Development Best Practices

The user interface is the engine that provides custom user experiences for each customer, and B2B companies can design radically different interfaces for segmented customers, stakeholders, third-party contacts, distributors and other business stakeholders. The interface is one area where developers can exercise their creativity and design skills to provide an experience that mirrors what B2C customers enjoy on user-friendly retail sites. However, best practices for B2B developers designing interfaces involve using heuristic information about customers that they gain through segmentation, buyer behavior, website analytics, trial-and-error, demographics and interface testing on multiple device models.

Usability Customizations Based on Heuristics

Empowering comprehensive research and getting approvals from multiple decision-makers and buying committees are the most important factors in designing user interfaces for B2B websites according to a comprehensive analysis that included website testing, focus groups and field studies.[3] Key findings also supported customizing interfaces based on the following heuristic information:

- **Matching Customer Profiles**
  Intuitive interfaces speak the user's language by using phrases and concepts that they understand. If targeting a sophisticated business buyer, don't speak as if trying to convince a trendsetting Fashionista. Information should be presented logically.
- **Easy Control**
  Users are unpredictable despite careful analyses. If a customer wants to navigate to another area, make it easy to do so. Make it easy to leave any given section if users navigate to them by mistake.
- **Maintain Standard Word Usage**
  Don't confuse users by using the same words for different things, confusing phrase variations, industry jargon or complex acronyms without explaining what things mean in the content's context.
- **Proactive Error Prevention**
  Address potential navigation errors proactively, and include confirmation options to limit user mistakes.
- **Code for Automatic Recognition**
  Customers who supply information or research products in one area of the website should not continually need to re-enter the same information. The interface should recognize what customers are investigating throughout their website journeys.
- **Limit Unrelated Dialogs and Links**
  Seeing too many unrelated options and dialogs frustrates customers and waters down the impact of relevant suggestions and information.

User interfaces aren't static but dynamic tools that need to change based on evolving customer profiles, marketing trends, new product lines, technology advances, changes to the SEO best practices and ranking algorithms of search engines and other criteria. B2B companies should strive to create dynamic, evolving eCommerce platforms that continually adapt, so it's perfectly acceptable to innovate in small ways, use trial-and-error methods and adapt. Every B2B operation can't compete with Amazon, Apple or billion-dollar national brands, so each company should follow its own path to growth, expansion and IT development.

2. Best Practices for Delivering Superior User Experiences

Delivering more options to user interfaces depends on back-end development, website design features, site functionality, connections with third-parties, product catalogs and internal searchability features. User experiences, often abbreviated as UX, describe everything that's available for users on websites. Enhanced searchability is a big feature of user-friendly websites. If a B2B company sells to plumbers, electricians, contractors and other practical engineers, then product catalogs could be overwhelming. Customers might need parts that haven't been manufactured for decades, but they're looking for workable substitutes. Designing a great user experience takes these customer problems into account and provides solutions such as product-locator wizards, custom searches by manufacturer, product type, product function, materials, specifications and other searchable characteristics.

Robust B2B eCommerce platforms solve problems for buyers by focusing on different customer profiles and providing each demographic group of customers with the tools they need to locate products, pay for them, research substitutes, consult outside industry experts, set buying limits in their organizations and accelerate committee or multiple decision-maker approvals of orders. Back-end customizations should maintain current inventories across multiple channels, provide versatile shipping options, show photos for product searches in real-time, and display snippets of information to accelerate complex searches.

Back-End UX Developments for B2B eCommerce

Back-end customizations can offer users lots of functional options such as managing the advanced-approval ordering process, researching products in-depth directly from contacts with vendors or manufacturers, getting price quotes for special orders, performing multifaceted searches, exploring shipping options and applying for flexible billing, paying and credit options.

However, the most important back-office use feature for most B2B companies is optimizing product searches. Designing a robust SKU table that includes alternate names, part numbers, manufacturer information and recommended substitutions for discontinued products can provide daily benefits to harried customers and B2B platform where expanded search functionality generates increased sales.

Front-End Design Features

User interfaces drive the process of showing the right features to customers and delivering the same convenience that B2C websites offer. If the customers have been segmented correctly, they'll see what's most important to them when they log-in on a mobile phone. The process, however, is an ongoing effort that needs to adjust based on new buying behaviors, seasonal buying habits, availability of new products and other sources of information about customers that become available through strong back-office analytics.

3. Navigation and Self-Identification Features

After B2B companies determine which features each stakeholder and customer needs for a great website experience, it's critical to integrate navigation and guidance strategies to provide users easy-to-read road signs on their journeys. The best features are useless unless people can find them, and shorter digitally-and-technologically-generated attention spans mean that people won't look for very long. For example, you might label product display pages for customers with boxes or buttons that read "Engineers," "Custom Builds," and "Manufacturers" to help people find the products they need faster. Numerous studies show that bounce rates can range from milliseconds to several seconds before digital wanderlust influences customers to go elsewhere.

Hit the highlights with lean, clean design and logical navigation instead of adding lots of confusing features, links and content. Most people are searching on their phones with small screens, and customers probably can't view much without scrolling. Appropriate graphics and illustrations are fine, but make sure that they tell the story of what's available when customers click on the link. Display pages should vary for customers based on segmentation intelligence, but that doesn't mean that designers shouldn't offer options for easy navigation to other areas of the site.

Tips from B2B eCommerce & Integrations

Creating great user experiences and custom user interfaces begin by establishing trust with your customers, staff and stakeholders to build collaborative and long-term business relationships. At B2B eCommerce & Integrations, we have the technical skills to build custom features and interfaces that deliver focused and expansive user options, but more importantly, we work with your IT teams and stakeholders in the development process. We also provide training, troubleshooting and testing so that you're never without resources for generating the best user experiences and gaining trust. We can help you work through hundreds of issues that modern eCommerce platforms generate, but we're ready to help with even the smallest issues. Call or contact us today to see how we can work with your IT staff and stakeholders to develop multifaceted search options, differentiated catalogs, custom pricing options, better customer-segmentation strategies and other features that define a user-friendly, dynamic platform for B2B eCommerce.

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Using Wireframes and Workflows to Customize User Experiences

Even the greatest business strategies begin with simple ideas that provide structure, and building a powerful eCommerce platform begins with mapping simple functions and connections that run beneath the design layer of individual page templates. Southwest Airlines was reputed to start as a simple drawing on the back of a napkin by Herb Kelleher who drew a triangle on a napkin in bar while commiserating on a recent business failure. The triangle connected San Antonio,Dallas and Houston. Simple ideas, often repeated, deliver astonishing workflows and stakeholder benefits just like Kelleher's simple designs and business philosophy turned a drawing on the back of a napkin into the most profitable airline in the world, and a bunch of ones and zeros drive the entire digital universe.

Wireframes and workflows are the digital equivalent of the back of a napkin or envelope. Wireframes are blueprints -- really just rough mockups of how functions should work and where content, images and support materials should go, and this includes forms to register customers. Most websites don't want an ugly form to dominate a display screen, so these features should not dominate the display on mobile devices, but a connecting button should be prominent and easy to access.

Workflows are the detailed plans to code websites to perform the desired actions that are included in wireframe blueprints. Wireframes really can be sketched out on the back of a napkin, but most developers use a whiteboard or digital template.

Steps to Fostering Multiple eCommerce Platform Conversions

Most of a B2B company's third-party and staff users have predefined roles, so it's not necessary to build profiles from visitor leads. However, new visitors to B2B websites often arrive by accident, and others won't stay long unless they find what they're looking for in the first few seconds. About 61 percent of B2B marketers complain about the difficulties of getting high-quality leads, but their own B2B websites remain the best resource for generating quality leads.[1] Using website architecture and careful planning enables B2B companies to qualify visitors, generate leads, profile visitors accurately and shepherd them through a far more complex sales process than B2C websites use. Design features, UI interfaces and customer experiences should be personalized for each user as soon as sufficient knowledge is gained to do so. Designing the back-end resources of a B2B platform to connect with front-end users and provide them with a personalized journey involves the following actions and steps in the development process:

- Qualifying visitors and getting them to "convert" or supply information that can be used as sales leads and to craft customized experiences on future visits
- Determining the preferences of front-end design features for each customer persona or profile
- Using wireframe design to create a rough blueprint of the actions that a page should perform and where content and graphical embellishments will appear on the page
- Integrating third-party tools in user experiences
- Updating or building new sitemaps to cover all the changes and enhance SEO and content searches in-house and externally
- Suggesting back-end resources and third-party integrations and supplying order forms and documents at appropriate stages for each customer profile
- Assigning different UI elements to each job in the wireframing process
- Creating workflows to transform wireframes and integrate existing resources into customer-centric UIs and UXs
- Testing each part of the work before going live

Great eCommerce platforms serve multiple needs for businesses, so these companies need a strong website architecture, customizable operating software and a strong foundation to support all the demands. Wireframes help to organize the framework, workflows make things happen, testing confirms everything works as planned and sitemaps show what's been done in ways that are easily followed by search engines. The first step in the process is deciding on business goals and determining what features are needed to accomplish them. At this stage, companies can determine how third-party and staff access should work and create wireframes to cover the processes. The next step is qualifying website visitors by getting their attention and persuading them to interact with the site to garner sales leads and customer-profile intelligence.

Boosting B2B Marketing Goals

The first step in the continuous process of qualifying website visitors is getting people's attention so that they stay on the site long enough for website metrics to get further information, which can be used to generate leads and customize the user experience. That sounds simple but proves difficult in real-world conditions when people are searching on the Internet on smartphones and want immediate answers to their preconceived questions. The best practices for new site visitors is to optimize the site based on the device visitors are using. If customers use a mobile device, the website can easily gleam geolocation data, and cookies can help to paint a picture of visitors that access the site from desktop computers.

Numerous marketing studies agree that companies have only about three seconds to show visitors that they have come to the right place to find the answers, products or information they seek. That's why the first set of wireframes in the B2B eCommerce development process usually deals with marketing-related conversions such as capturing leads, getting people to register and convincing them to download something or otherwise identify themselves. If the website can get their attention for more than three seconds, there's a strong chance that visitors will acquiesce to providing at least 30 more seconds to be convinced to do something or receive an overview of the company and its products or services.

Content Is King, but Wireframes Put It on the Throne

Ultimately, content is what will convince people to stay on a website or take other actions that can promote a B2B company's initial goal of obtaining actionable marketing information. Delivering relevant content at critical stages of a visitor's journey results in higher conversions, and 86 percent of B2B organizations use content in their external marketing.[2] However, inbound marketing saves an average of $14 dollars in advertising costs for each new customer that companies acquire.[3] It's critical to make the best use of an eCommerce platform’s existing content, which customers might never see without a strong engagement strategy. Unlike B2C websites that receive thousands of visitors and can afford to operate if they just convert small percentages of their total visitors, B2B companies have fewer visitors and a longer sales process, so sound business practice dictates that companies engage their visitors at higher rates to be successful.

Wireframes guide the strategy of where to put each feature in new-visitor displays based on which device each person uses. Wireframes show how the content works in a graphical context by laying out how the display will look, where to place images, video and audio files, which creative company assets to spotlight and what other lead-generating features to incorporate to capture information. Planners need to pay attention to keywords, tone, language and other factors in the actual content to connect with visitors, but the wireframing can be done early in the process because it helps to set content goals and results in better content generation. Examples of typical B2B engagement strategies for first website visits include the following actions:

- Getting visitors to identify themselves
- Convincing people to register
- Gaining information by offering an incentive or free download
- Persuading visitors to reveal their reasons for visiting the site by answering questions
- Customizing displays by asking about which products or catalogs interest the visitor
- Offering free newsletters or marketing tips
- Telling a compelling story about the company or current events that impact the relevant industry or B2B market
- Providing free consultations on marketing

The goal of first contact is to gain sales leads, but don't ignore the opportunity to make an immediate sale, though this happens less commonly in B2B marketing than retail sales.

Using Wireframes and Workflows to Nurture Sales

Once visitors pass the lead-generation process, the next level of design uses wireframes to craft the user experience based on lead information. This is the point where simple actions become more complicated because many actions are possible to nurture business relationships such as providing customers with information about products, connecting with third-party resources or sales staff, applying for credit, ordering directly online, requesting custom prices, choosing product customizations and ordering custom-built products and fabrications.

In effect, every part of an eCommerce platform functions as a salesperson and guides the customer toward a conversion. In B2B companies, this could involve submitting proposals negotiating terms, processing purchase orders, scheduling face-to-face sales meetings, viewing product demonstrations, researching product compatibilities, arranging special payment terms, gaining approval from multiple stakeholders in the customer's organization, checking inventories, backordering products when inventories won't cover the order, scheduling drop-shipping to fulfill orders and requesting split-shipping for purchasing managers who buy for chain stores, government agencies and multiple locations.

Developing Custom User Stories into Polished User Features

Once the processes for identifying prospects and converting them into customers are in place, it's time to map UI- and UX-specific workflows for normal customer activities such as managing the checkout process, operating user dashboards, paying invoices, reordering and asking for staff assistance. It's important to automate and simplify every process so that users enjoy a friendly, simplified website experience. That's why it's critical to get outside opinions on these processes to confirm whether they're as intuitive as planned. This is the part of the design process where assigning tasks to customer or stakeholder dashboards is done, apps are integrated and existing processes are improved.

Best practices in this phase of development include performing tests, split-testing and other finalizing and proactive tasks to find how the improvements work on various kinds of devices and how easy it is for stakeholders to engage with the company and its resources. Each process should be well-designed, automatic and as easy or easier to perform than those of company competitors, so planners should research similar B2B operations.

User Stories

User stories are specific roles assigned to different stakeholders in agile development practices. These stories can focus on different actions such as opening an account, entering a password, checking out products or getting access to different areas, databases and interactive applications. User stories also assign roles to third-parties that use the website, which include vendors, business associates, distributors, shippers, informational resources and staff members who have access to different areas of the company's operating system. Each of these stories represents a distinct point-of-view and requires a custom workflow to code the actions properly. Wireframes provide blueprints of all the underlying actions and design features of each website page while workflows are task-specific instructions for transforming each of these actions into a finished website feature. During the design phase, it's convenient to work out plans for all stakeholders, but that doesn't mean these can't be integrated or changed later.

Collaborating with Custom Workflows

Transforming an eCommerce platform to provide customized user experiences, easier company management and collaborations with third-party associates is, in itself, a wonderful opportunity for collaborating with development partners, which can even include people who know nothing about writing code. Many of the demands of providing customer-specific content won't require generating new material; most established B2B companies already have this information in one form or another. It's just a matter of leveraging white papers, e-books, studies, product descriptions and other company content and fine-tuning it to the stakeholder's point-of-view with a few key changes and calls-to-action addressed to the customer or company stakeholder. This is a workflow that can easily be delegated to staff members and outside consultants to accelerate the development process.

Tips on Wireframes and Workflows from B2B eCommerce & Integrations

Our engineers at B2B eCommerce & Integrations not only understand what it takes to build a user-friendly eCommerce platform but also can help with the planning process where you match business features to customers to generate amazing website experiences for all users including staff and business associates. Our team works carefully to design custom wireframes and workflows that handle simple work processes that are repeated thousands of times, and these actions save users time, help them connect with support services, provide custom forms and perform many other actions that ensure a seamless experience. We like to be involved early in the process because we can provide valuable tips and creative suggestions, but we're glad to step in at any point to work if your IT teams get stuck on any aspect of designing a B2B eCommerce platform. Call or contact us today for a consultation on design layouts and the wireframes and workflows that support them.

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Functionality of B2B eCommerce Site Design Mockups

Appealing design and high-performance functions build credibility into inbound marketing, sales generation and collaborations, but the process requires doing a virtual walk-through of the plans in the same way that a builder would consult the owner, architect and outside stakeholders before building a custom home. Each point-of-view must be considered in home building such as utility company guidelines, zoning regulations, engineering best practices, landscaping, fire department requirements and other related home-building best practices. Builders must design blueprints, incorporate appliance connections, plan room dimensions, select color schemes and perform hundreds of other processes before starting construction. The prospective homeowner wants to see detailed blueprints, CAD drawings, material samples and other particulars before approving the plans.

Building a high-performance eCommerce platform should work the same way. Statistics show clear benefits in developing a cohesive design strategy. Specific concerns for B2B strategists include slower download speeds in the United States than Japan and most European countries and customers who only wait a few seconds for websites to load before bouncing to another site.[1] Design issues and customizations are critical to get people's attention, and savvy designers are investing in their futures by building more versatile and personalized B2B eCommerce platforms.

During the build, wireframes and workflows define how the website will look, what it will do and how it will customize user experiences, but design mockups go even further by incorporating all the design details so that decision-makers know exactly what they'll be getting when the developments go live. These details include design features like typography, color schemes, company logos, images, video files and other design elements.

Interactive B2B Website Design Mockups

New processes, workflows and tools are critical in the evolving marketing ecosphere. It’s no longer sufficient to use Photoshop to design a live eCommerce website and forward it to a development team to fill in the details. Developers increasingly play critical roles in the design process by helping to design function-mapping wireframes, interactive mockups and even browser prototypes that can trigger live functions and generate Web pages that look just like the final development will appear.

Best Practices for B2B eCommerce Platform Design Mockups

Functionality wireframes, design mockups, custom workflows and other development tools generate costs that can be credited to back-end ERP and CRM systems as necessary expenditures for doing business online. Using the right planning and development tools and partners generates substantial savings by eliminating false starts, increasing platform efficiency, jumpstarting inbound marketing efficiencies and significantly reducing the costs and challenges of collaborating with vendors and other third-party resources.

Starting Points for Adding Design Details

Generic best practices are great starting points for determining final design details, but these can change based on many details of a company's business model, ideal customer, level of back-end integrations and other criteria. Typical B2B design best practices include:

- **Leaving Breadcrumbs**
  Breadcrumb navigation informs site visitors where they are at all times and shows where they've been on the site. Visitors can review how they came to a given section, backtrack and follow another path to their desired destinations.
- **Progress Bars**
  Page-loading, downloading and uploading indicators can show visitors how long they need to wait for various menu options or connecting with third-party business associates.
- **Providing Business-Friendly Tools**
  B2B customers might access special tools like calculator, click-to-call, click-to-email and social media widgets to make cost-profit calculations, research RSS feeds, customize products and connect with their own digital constituencies to generate grassroots support for new products.
- **Page Header Design**
  Page headers should look like the links or navigation headers that people use to arrive at the page to reassure the customers that they have arrived at the right place.
- **Confirmations**
  Any action that a customer takes should be confirmed with a Thank-You message or confirmation of the action.
- **Highlighting**
  The visitor should be able to determine where they are and where they want to go with automatic highlighting, underlining or bolding of links and headers.

- **Using Custom Images**
  Regardless of company, stock images are poor choices for eCommerce websites. Use photos, images and illustrations that are unique and show real products, company staff and business situations and locations.

Industry-Specific B2B Mockup Best Practices

Design awareness determines the best practices for designing mockups or prototypes. The particular business model of a given B2B company might be selling to resellers, businesses that sell to consumers, companies that need services, buyers for large companies, office designers and buyers or manufacturers needing supplies, materials or equipment. Each of these business models has its own industry standards, regulatory challenges and needs for specific types of eCommerce features. Design teams should incorporate specific best practices based on the relevant industry, business model, customer profiles and other criteria. For example, a B2B company selling high-end office furniture would place more focus on design aesthetics than a company selling parts and equipment to contractors, but both would want clear, high-resolution images to showcase their products to best advantage.

Researching Customer, Staff and Stakeholder Needs

Research is critical to write a user story for each stakeholder, process and feature that decision-makers decide to incorporate into their eCommerce platforms. Ask the staff what features they would like to have to facilitate their work, and do the same for third-party website users, outside marketing teams, carrier companies and vendors. Design preferences can be considered if they don't conflict with the overall platform design and theme.

Customers present challenges in determining their needs. Focus groups and surveys are one option, but buying behavior, profile-specific integrations for each customer and design features for the ideal customer are better indicators for customizing design features for each customer persona.

Supply chain management is crucial to B2B success, and shipping and warehousing options, logistics, geographical areas where the business operates and other defining characteristics of the supply chain determine what features are needed.

Design Elements to Support Platform Features

Each stakeholder and customer persona has a unique set of functions that an eCommerce platform can provide, and B2B goals and stakeholder needs define functionality, which is roughly mapped by wireframes. Design elements include the physical characteristics of the site such as company logos, complementary colors, easy-to-read typefaces, font sizes, bulleted-list designs, images, navigation buttons, characteristics of features like highlighting and many other particulars. Some design work can be done in conjunction with the discovery and research process where developers work to determine a fully functional blueprint that includes each feature, image, event, navigation path, trigger and connection that stakeholders will use on their journeys throughout the platform.

Catalog design is a major concern, and many platforms have multiple catalogs or subcatalogs that might include custom stores-within-stores, showcase areas for manufacturers and other catalog customizations. Key catalog design decisions include whether to keep products static, show multiple product views and deliver snippets of content when cursors hover over each product listing. Determining how extensive descriptions are and what expanded information and specifications will show when people click on a product are also major design decisions.

Content, which includes descriptions, support information, company information, instructions, articles, FAQs, testimonials, reviews, images, photos, videos and illustrations, should be laid out in an aesthetically pleasing way where each paragraph, list, caption, headline and illustration complements and defines the other content elements.

B2B design elements should never be boring, but they can be conservative, edgy, creative or unusual depending on design decisions of the team. Just because the platform targets B2B customers doesn't mean that companies can't use bold colors and startling imagery, but these elements should complement design and appeal to the platform's ideal user regardless of whether he or she is a Millennial, Baby Boomer, international business buyer or youthful techie expert. Content language, images, design elements, page layouts, type sizes and other details should speak to each customer persona and enhance the business processes that website features optimize for customers.

Incorporating Business Needs into Designs

B2B companies have their own management needs that their platforms need to support, and the more aggressively designers incorporate enlightened self-interest into eCommerce platforms, the better the results of customer integrations will be. Initial discovery and design processes can proceed simultaneously, but they'll need to be completely integrated when producing the final mockups before the development teams are authorized to begin coding the platform. Business needs might include special considerations like developing changes on a limited budget, producing new content, fine-tuning existing content, meeting aggressive deadlines and other business modalities.

Fostering Better Internal Communications

It's easy to see how the lines of communications connect and intersect in wireframes. ERP and CRM software have their own design features, but these can be customized for better functionality and expanded communications options for key user stories such as those related to company processes of collaborating with production, managing inventory, determining timelines, managing project changes and triaging processes when things go wrong. Better communications help staff deal with internal drama, manage company processes more efficiently, meet tactical and strategic objectives and handle special projects like drop-shipments, split-shipping, product customizations and customer support.

Intuitive Designs that Facilitate Work Projects

Unlike customer-facing design features and areas designed to attract attention, the areas where staff work should have a logical structure for performing daily business tasks, and customizable interfaces for staff members are a big advantage for people who work with these features and processes exhaustively each day. Dashboards are valuable tools for staff members, customers and third-party associates. Designing the dashboard blends functions and design features, which users can customize. For example, an insurance company that insures invoices usually requires access to customer financial information to underwrite credit limits or assess insurability. If insurance underwriters connect with the site often, they might prefer using their own reporting styles and company features to make standardized comparisons of financial data easier.

Vendors might supply further research, product details, demos and white papers on materials and product compatibilities. These custom connections are extensions of a B2B brand, so design features and colors should match those of the B2B platform company with fewer instances for customer-generated customizations. However, vendors should be able to customize their own dashboards to optimize productivity. These kinds of assessments move down the line of third-party integrations for vendors and manufacturers. Some stakeholders might want to use their own logos and colors while others are perfectly willing to accept the website’s design details. Carriers' shipping integrations definitely have their own logos, formatting styles, content and presentation styles that are well-recognized by B2B customers and should be included in integrations.

Bringing Everything Together in a Comprehensive Mockup

Each user story has both a functional and design component that a detailed mockup -- or even a working prototype -- can build so that decision-makers get no surprises later. The mockup should show exactly what the platform, website or customization can do, how it will look and how it can address marketing, sales, collaborations and internal management issues. The benefits of designing wireframes and complex mockups include spotting miscalculations, providing a highly specific blueprint to development teams and specifying multiple user stories, website interactions and features that the development will address. The potential returns of customizing an eCommerce platform are enormous because if designs can't reach mobile and desktop computer users, B2B operations can quickly become marginal in today's competitive marketing environment. Mobile digital time now accounts for 51 percent of Internet use in the United States, and traditional office computers still are used 42 percent of the time.[2] B2B companies can't afford to ignore either of these business opportunities for customer engagement.

Design Mockup and Prototyping Tips from B2B eCommerce & Integrations

Designing an eCommerce platform can be the fun part of the development process, but the work is especially challenging for B2B companies because design depends on functionality and serving multiple stakeholder interests. At B2B eCommerce & Integrations, we work with all stakeholders to incorporate their best interests, simplify using the platform when it's online and ensure that the system handles business while providing intuitive navigation and appealing design aesthetics. We bring highly detailed mockups, templates and prototyping capabilities to the process so that you know all the details and can troubleshoot any problems or design errors before customers use the platform's expanded features. Call or contact us today for a consultation on how a deliberate and comprehensive planning and mockup process can save money and accelerate developing a high-performance eCommerce platform.

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Best Practices Checklist for B2B eCommerce Development

Developing a B2B eCommerce website becomes easier when planners structure what they want to do ahead of development instead of adding features randomly. To make matters easier, Clarity Ventures, one of B2B eCommerce & Integrations' top business associates and a leading eCommerce developer, compiled the following checklist for expanding business-to-business capabilities to optimize a smooth launch of new capabilities live. The checklist includes the following key tips for planners:

1. Deciding on sales tax collection strategy and sharing the relevant information with the development team
2. Getting information on existing and desired carrier accounts and sharing it with the developers
3. Defining the shipping process comprehensively for both existing and desired abilities
4. Determining customs and duties for each country where sales are made
5. Preparing lists for products, cases of products and other shipping weight dimensional information
6. Registering merchant accounts and configuring them for B2B sales
7. Choosing the right PCI DSS validation process for the company
8. Following the PCI DSS website's guide to get certified
9. Setting up automatic auditing needs for an effective eCommerce platform
10. Gathering content materials and variations for each customer, partner and marketing application including product descriptions, content and website iterations for specific profiles, images, product demos, images and videos
11. Executing an audit of customers and their personalized content needs
12. Optimizing current metadata to align coding with the latest SEO trends and algorithms established by Google and other search engines
13. Coding each new kind of content, feature, image, video and application with the latest metadata best practices for SEO
14. Creating a spreadsheet that tracks all existing and desired pages and features and the pages, features and third-party applications to which they will connect
15. Deciding which information on accounts and customer stakeholders to keep and which to revise for greater access, better security and greater access on more channels
16. Defining default prices, customer-specific prices, differential pricing incentives, pricing tiers and prices for business partner partners and close associates
17. Defining in-house account credit rules and criteria
18. Developing inventory management rules and other management-capability wishlists

Relevancies to Consider for Each Item on the Checklist

There are certain options to keep in mind for each item in the checklist. In general, B2B eCommerce companies can delegate many of these research and planning activities to staff members, consultants and IT teams to accelerate the development process.

1. Sales Tax

Sales or use taxes might apply if a B2B company sells business supplies in the following situations: sales of these items in states where the company has a physical location, employees who work there or states where the company owns intangible property. Businesses might be required to register and remit taxes, or alternatively, to remit use taxes in states where they don't operate according to each state's rules. Research is needed to automate sales tax and use collections where applicable and to maintain resale certificates and allowable products that are nontaxable for companies that resell goods.

2. Carrier Accounts

Offering customers multiple carrier options within the website is a critical factor in B2B success because 61 percent of customers abandon sales when shipping costs exceed their budgets or reduce profits.[1] Unlike B2C companies, B2B eCommerce platforms must offer their customers expanded carriers and shipping options including researching and applying unexpected shipping charges for customs duties and other variables. Drop-shipping and split-shipping are common, and shippers can vary by location. When changing or launching a website, it's important to review shipping options and decide what's needed for a robust platform.

3. Shipping Process

The shipping process for B2B orders can be enormously complex and involve multiple factors such as filing paperwork for customs approval, arranging split-shipping and drop-shipping, handling carrier changes for better getting better costs, managing the supply chain, optimizing faster deliveries and providing customers with desired use-friendly shipping integrations for calculating costs. Planners need to define their existing processes involved in shipping products and providing customer-friendly tools and to define any new features that they want to incorporate. Shipping is integral to eCommerce, so it's better to incorporate new shipping capabilities during development than trying to add them later, which increases costs and generates integration difficulties.

4. Customs and Duties

Handling customs and duties can prove incredibly complex, so developers need data for each country where products will be sold to build automatic integrations that calculate customs, duties and foreign taxes, which vary tremendously. Integrating taxes, customs and duties calculations into an eCommerce website provides a better customer experience that saves staff time for calculating these manually, but research is needed for all the jurisdictions where a company sells or at least those areas where sales volumes justify this feature.

5. Compiling Dimension Weight Data

Before an eCommerce website can calculate shipping charges, it must integrate the dimensional weight shipping rules for each of its carrier options. Most wholesale carriers charge by LTL rules, and FedEx. UPS and the USPS charge for packages based on dimensional weight pricing. This means that larger packages might cost more even if the weight is low because the packages take up lots of space on trucks and planes. Thorough research of each carrier and the dimensional weight data of single products, case packages and pallet of products is necessary.

6. Merchant Accounts

Setting up merchant accounts to accept payments is necessary in eCommerce but different for B2B companies. It's possible that will choose third-party payment processors, direct processing abilities with credit card processors or multiple payment options. Setting up these accounts is an essential B2B feature if companies want to offer their customers more ways to pay. Information makes it possible for developers to design and install virtual terminals, add real-time payment gateways to existing merchant accounts and implement new merchant accounts with Level 3 data integration and secure storage of financial information that satisfies company security objectives and PCI DSS compliance rules while enabling storage of financial information for repeat orders and recurring transactions.

7. PCI DSS Validation

The Payment Card industry Data Security Standard applies to companies that use, store and transmit protected financial information. Companies bear responsibility for compliance, but many of the company's payment processors offer compliance tools for businesses they serve. It's essential that companies implement PCI standards. Developing a plan for physical and digital security protocols is essential if companies want to avoid fines, penalties, customer lawsuits and even cancellations of their payment processing privileges due to security breaches caused by noncompliance.

8. PCI Compliance Guide

The compliance required for B2B companies includes implementing training programs for employees to educate them about security risks. B2B companies can develop stricter digital and physical safeguard that fall outside of the practices that credit card companies recommend because developers can build and integrate various compliance tools for the eCommerce platform to fulfill baseline requirements or higher standards. The PCI DSS website explains the requirements of getting PCI-certified, which is an essential starting point for defining what’s needed on the platform and for in-house training and security practices.

9. Automated Auditing

An automated auditing tool for B2B eCommerce platforms offers many advantages, but each eCommerce operation is different and requires custom integrations and features to enable auditing applications to manage and audit the business intelligently. Planners need to determine what areas to audit automatically, and these might include:

- Providing a unified view of separate integrations of accounts, cross-channel customer experiences, customer service, order management, merchandising, marketing and the POS system or third-party payment processors
- Delivering personalized marketing message based on customer service, buying behavior, customer profiles and customer touch points
- Supporting scalability and adding custom integrations as needed
- Providing compelling Web experiences on mobile devices, website visits on regular PCs and in-store experiences
- Monitoring and integrating inventory counts in real-time
- Centralizing order management

10. Gathering Content Information

Content information needs careful curating to assign particular types of content to established customers, new prospects, customer company stakeholders, secondary decision-makers and products that require steeper educational materials and resources for decision-makers. Some companies might target just one high-volume client while other focus on many customer profiles. Content information includes articles, descriptions, white papers, vendor-supplied materials, images, product demos and outside marketing content. Only 44 percent of B2B marketers have a documented and differentiated content strategy, and only 42 percent of them consider their strategies effective.[2]

11. Content Audit

Executing content strategy depends on conducting an audit of available content to see what can be used as-is, what needs fine-tuning what new content needs to be developed to match persuasive information to various customer profiles, targeted prospects and general marketing strategies. Honoring personalized content doesn't just involve the website but should follow customers across multiple channels to deliver a consistent experience to reduce confusion. That's why a content audit is so important in B2B inbound and outbound marketing. Only 51 percent of B2B companies try to align content with their customers, and 47 percent use branded content strategies.[3] These trends are rapidly evolving into SOP, so completing a content audit is critical to assess content for social media, branded apps, website and Web page content automation, blog postings and custom product videos and demonstrations. A content audit will enable a customer to start an order or product research on a mobile device and finish it on the website while receiving the same personalized information across all channels.

12. Existing Metadata

Coding existing metadata should always follow current trends in SEO best practices, so planners need to gather all their existing metadata to ensure that it conforms to current standards. Most development partners will offer this service automatically, so the step usually won't involve much code tweaking by B2B company staff.

13. New Metadata

New metadata must be included for all content applications that target specific customers, and the latest SEO trends should be followed for both specialized and generic onsite and offsite searches.

14. Spreadsheet Organization

Organizing what B2B company want each page, content feature and third-party integration to do and pages that they will connect to are key development goals. It helps to organize all these integrated relationships and connections on a spreadsheet so that developers can create wireframes, design mockups and workflows to accelerate the development process.

15. Account Information Access

Transferring account access information and updating information access are critical for B2B success and smoother transitions when developing new websites and upgrades. Planners should determine what permissions they want to keep and which ones need further work. Customers have multiple decision-makers and stakeholders who need to access key information on multiple channels and devices, so it's important to set account information limits and standards. Some access might involve requiring complex passwords and security protocols while others should be available to any authorized user. It's necessary to define user access levels and security standards for access according to predefined limits.

16. Customer- and Partner-Specific Pricing

Successful B2B companies handle various pricing tiers for their customers, offer special price quotes for large and custom orders, intuitive suggestions and custom searches based on customer profiles and personalization. Dynamic pricing allows prices to register for preconfigured pricing tiers or custom quotes for each customer. Tailoring these prices requires integrating with custom quotation integrations and standard pricing tiers for each type of customer. Business associates, distributors and partners may have different pricing, but their prices should calculate automatically as much as possible. Some new customers might require price incentives to encourage them to do business. Differential pricing might be required in those cases.

17. Credit Rules for In-House Accounts

Determining the rules for granting credit include setting terms for payment, establishing credit limits, authorizing customer stakeholders access to lines of credit, setting dollar limitations to each authorized buyer in a company, assessing interest charges for late payments and other details. B2B companies have to decide whether to relax their rules for new companies to develop long-term relationships or to secure business from companies that have complex purchasing requirements or no obvious need for credit. For example, Wal-Mart typically uses trade credit as a source of capital, which effectively uses its suppliers for increased cash flow more often than borrowing money from banks and eight times the amount that shareholders have in the company.[4] B2B companies choose to comply with Wal-Mart's practices because it's the world's largest retailer.

18. Inventory Management Accounts

Building management capabilities affects every aspect of dealing with customers, integrating with third-party associates like distributors and updating inventory figures in real-time based on needs, priorities and other criteria. Inventory management should connect with multiple points in the supply chain to foster faster information on drop-shipping, split-shipping and backordering. Other key features that B2B companies may want for internal management include analyzing customers and prospects that have been retained or lost. Building long-term relationships requires developing greater knowledge of customer behavior for segmentation, so B2B companies need the management tools to gain behavioral insights. Tracking cost efficiencies, fraud and theft are also key abilities for better management. Defining these needs and the connections they must make are essential to designing the right inventory management capabilities and other back-office tools.

Tips from B2B eCommerce & Integrations

Designing an enterprise-level B2B eCommerce platform can overwhelm decision-makers and IT teams, but B2B eCommerce & Integrations' skilled engineers live, breath and dream code. Our development team has vast experience working with leading eCommerce developers to customize software for your needs. We can provide development tools and tips and templates, work with multiple third-party associates and simplify the planning and development of customizations that create responsive user experiences and better management capabilities while training your team to execute best practices and comply with regulations and security protocols. Contact us today for practical development tips and a consultation on developing a new B2B eCommerce platform or adding eCommerce capabilities to your existing business operations.

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Accepting Online Payments from Multiple Gateways

Traditional B2B invoicing, on-account arrangements and payments by checks prove increasingly inefficient when companies can get immediate payments using credit cards and integrating other mobile payment systems into their eCommerce platforms. Technology and faster communications, secure encryptions of financial information and growing acceptance of mobile payments are influencing business-to-business organizations to offer more payment options to their customers. Integrating multiple payment solutions not only leads to faster payments and better cash flow but also simplifies accounting and provides backup verifications of customer payments for taxes, financial reporting and borrowing capital for business expansions.

Consumer buying behavior drives the mobile payment industry, and companies like eBay and Amazon have encouraged greater consumer acceptance of paying for goods and services with mobile payments and new technologies like Apple Pay, Samsung Pay, Google Wallet and Bitcoin. PayPal now handles vast numbers of online payments, and anyone can use its system to send or receive money. Some eCommerce implementations still require using the traditional payment processes of negotiating prices, submitting purchase orders and invoicing clients, but more and more companies and buyers are taking advantage of omni-channel payment options. Paper checks are subject to theft, generate high processing costs and are often returned by banks for insufficient funds. Studies show that eight billion invoices paid by check cost U.S. businesses $100 billion in annual processing costs.[1]

Most B2B companies struggle to implement electronic payment systems primarily because of the challenges of integrating with out-of-the-box accounting software and antiquated legacy systems. However, 91 percent of all adults now use mobile phones and can easily pay companies directly with debit checking cards, credit cards or other mobile payment options.[2] Customizing a B2B website for multiple payment options provides long-term benefits that will only increase with time and enable increased automation of company processes. These include automated options for recurring billing, interactive voice response or IVR technology for confirming orders and taking credit card or billing information and Virtual Negotiation technology for speeding agreements and handling payment disputes. Mobile payments grew more than 9 percent annually in 2013 and now account for more than 40 percent of global revenue.[3] McKinsey predicts a sustained annual growth rate for mobile payments in excess of 6 percent that should surpass $2 trillion annually by 2020.

Accepting multiple payment types increases the value of any eCommerce platform by empowering customers and simplifying the billing-payment cycle. It's a new world for B2B companies that stand to benefit from these technologies, but there are issues to consider. Most mobile payment services charge percentages of transactions, fees for each transaction and standard monthly charges that can increase product costs and reduce profits.

New regulations also increase the standards of care that companies must provide to ensure that financial information stays secure. B2B companies that also sell retail products usually have multiple payment systems in place, but companies that only sell to businesses might need to learn the ins and outs of mobile payments, POS software and using credit card intermediaries. Most businesses find that integrating these payment systems are worth the extra effort. The benefits of doing so for B2B organizations include:

- Satisfying customer demand for alternative ways to pay
- Enabling mobile payments from anywhere at anytime from any device
- Speeding payments with mobile invoicing
- Increasing customer convenience and fostering better user experiences
- Enhancing data-mining intelligence gathering
- Optimizing sales reporting and income verifications
- Improving financial transparency
- Strengthening traditional B2B billing practices
- Allowing salespeople to accept payments in the field without asking customers for confidential financial information
- Empowering proprietary app users to view invoices and remit payments directly from within their apps
- Accepting multiple currencies and performing automatic conversions through payment-provider intermediaries

Mobile payment options become increasingly important for B2B companies to remain competitive, and most companies should offer their buyers the most popular payment options at a minimum. The easier that companies make paying for products, the faster they get paid and the more customers they attract and satisfy.

Common Payment Options for B2B Companies

Key considerations for B2B companies that want to add new payment options include interoperability and integrating payments with existing back-office systems. Most ERP and CRM software can integrate mobile payments with banks, payment processors and accounting software. In some cases, it might be necessary to customize the existing software to integrate fully with invoicing, financial accounting and accounts receivable to build a seamless process. For example, there could be problems if customers pay parts of invoices with different payment methods. The most popular ways for people to pay online for products in the United States include PayPal and credit cards, and the most common B2B payment options include PayPal, credit and debit cards, on-account payments and WorldPay.

PayPal and PayPal Pro

PayPal offers a turnkey approach for accepting online payments, and smaller B2B operations can accept PayPal payments directly while larger companies usually choose the PayPal Pro version, which offers collaborations for setting up and integrating shopping carts, integrating other mobile payment providers and connecting with Web development teams, business partners and B2B billing platforms. Regardless of version, B2B companies can use PayPal to pay their own suppliers, consultants and vendors and enjoy the following benefits:

- Accepting most common credit and debit cards
- Allowing customers to pay with PayPal credit accounts
- Simplifying PCI compliance for payment encryption and security practices
- Receiving payments from customers without requiring them to leave B2B websites
- Optimizing checkout experiences for B2B customers who buy products using self-service
- Generating better user experiences through simplified payment options
- Supporting virtual terminal technologies
- Integrating with the API layer of all types ERP and B2B accounting software
- Offering fully customizable options for B2B companies
- Supporting HTML, SDK packages and NVP and SOAP APIs
- Simplifying API-integrated reporting, refunds and system updates

Credit Card Payments

Credit and debit card payments have largely replaced cash transactions even in face-to-face business transactions, and they're critical to doing online business. B2B companies face risks of PCI and DSS compliance when accepting credit cards and handling the financial information of their customers. Despite advanced NFC communication protocols, encryption technology and supposedly fraud-proof EMV credit cards, identify thieves and hackers still managed at least 1,540 data breaches in 2014, which was up 46 percent from the previous year.[4] B2B companies face fines and lawsuits if they don't comply with DSS and PCI regulations, and these companies and their customers are frequent targets because credit cards usually have higher spending limits. Using an intermediary so that companies never receive, store or transmit financial information is one strategy for ensuring compliance.

Visa, MasterCard and American express are pushing for universal adoption of a tokenization system in all online transactions -- both B2C and B2B -- where all credit and debit transactions are replaced with token that's associated with the 16-digit primary account number. B2B companies can register with a PCI-compliant processor that assigns a token for each transaction. Customers enter their credit card information on the website as usual, and the purchase is authenticated, but the third-party vendor stores the information, assigns a nickname for the transaction (the token). The B2B site uses the token to receive their funds but never stores financial information, so it remains protected from hacking, employee theft and even company mismanagement. The approach complies with PCI regulations, but companies might need customizations or payment plugins to integrate these features into their business systems and link seamlessly to ERP and CRM software.

Purchase Orders, Invoicing and House Accounts

Unlike B2C websites that require upfront payments, many B2B operations offer their clients more flexible payment terms to purchase on account, issue purchase orders and be invoiced later. Some companies offer their customers credit terms or encourage prospects to try the company's products risk-free. Some companies still use a traditional approach and choose an intermediary to hold funds until products are shipped to a client's satisfaction, but that's becoming less common as online payments gain wider acceptance due universal mobile payments, credit card company delivery guarantees, business credit cards and advances in payment processing, tracking and monitoring transactions.

Some companies provide open accounts for their employees to buy products up to preset cash limits, and some bulk buyers might need to bill separate store accounts. Each of these scenarios requires back-office customizations, careful management, excellent tracking and full transparency, and B2B companies often need special capabilities to manage these processes.

Fortunately, technology and software can be customized to handle all kinds of billing strategies, integrate with other payment options, generate a synchronized accounting of purchase and payment activity and generate warnings and holds based on spending limits. Customizations can also speed up invoicing and billing in the following ways:

- Sending invoices automatically to multiple addresses or routing them to decision-makers for approvals
- Splitting invoices among different shipping addresses
- Enabling authorized users to access account information
- Encrypting financial data to comply with financial regulations
- Gathering tax information and forwarding payments to the appropriate taxing authorities
- Generating automatic reminders
- Assessing late fees, fast-pay discounts, interest charges and collection fees
- Following up on customer service issues to boost payments
- Processing check payments with remote-capture deposits to speed availability of funds
- Streamlining the traditional PO system to accelerate invoicing and payments
- Managing electronic fund transfers

Even the classic B2B invoicing and billing methods become more efficient with customizations to the API layers of back-office software and front-end customer management features. Company decision-makers can automate billing, reduce staffing needs and billing errors, reduce payment processing costs and still receive payments faster.

WorldPay

WorldPay, which is an international payment processing company that's listed on the London Stock Exchange, delivers global sales processing capabilities for B2B eCommerce platforms, and companies can use these services at physical locations, online and on mobile devices to broaden their payment options. Key benefits for B2B companies include handling multiple currencies and using Apple Pay and Android pay systems as well as major international credit cards. New payment methods are becoming increasingly common, and WorldPay will likely be among the first processors to add these new payment options as they become available. The benefits of offering this option to customers include:

- Providing an intermediary between customer financial information and B2B companies so that administrators don't need to worry about PCI and DSS compliance issues
- Ability to view all payment transactions on an integrated Business Dashboard
- Leveraging tools for managing procurement, staffing needs and spending based on the processor's strong analytics capabilities
- Getting ready to accept online payments in as little as 24 hours
- Viewing real-time data on the live dashboard
- Triggering instant notifications and updates
- Managing returns with one-click efficiency
- Sending invoices electronically and following up on customer service issues related to payments and invoices

The WorldPay API integrates easily with back-office software, installs quickly and optimizes the customer onboarding process. WorldPay's support team and Partner Portal allow B2B companies to run automatic background and credit checks on business associates and customers for extending credit, entering partnerships and other initiatives.

Other Payment Options

Integrating multiple payment options might include flexible billing, seasonal billing and other special arrangements based on customer value, length of the business relationship and other criteria. Ensuring a seamless process in special billing processes requires integrating customizations in the API layers of back-office accounting and inventory management software and front-end CRM and customized user-experience integrations. Getting paid accurately and timely can affect every aspect of an eCommerce platform, so it's critical to develop billing customizations with a skilled development partner to ensure regulatory compliance, full integrations and access to tools for accelerating collections if they become necessary.

Tips for Building an Omni-channel Payment Environment from B2B eCommerce & Integrations

Today's expanded payment options are essential for companies that want to build a versatile eCommerce platform that connects with all types of buyers and third-party associates. Our experienced engineers can help your company fine-tune integrations with the most popular payment options while addressing any security problems that arise from accepting mobile payments such as limiting access to staff and stakeholders to confidential buyer financial information. We'll help you customize your platform for related issues like offering better mobile invoicing, optimizing traditional B2B payment methods, integrating new payment options and ensuring regulatory compliance. Call or contact us today at B2B eCommerce & Integrations for answers to your mobile payment questions or to schedule a consultation about any issue involving building a better eCommerce platform with design and function customizations.

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Best Practice for Managing B2B Customers Who Purchase On Account

B2B buying decisions are no longer simple matters that the company president or purchasing manager decides based on long-term loyalty, cronyism or the ability to get a good deal. Customers are following a more complex decision-making process that involves using platform-enabled support services and assessing each B2B company's credibility, ordering convenience, ability to customize products, social chatter about the company, customer reviews, business ratings and customer service processes for providing quick answers to product questions to assuage increased product skepticism. The authority to make decisions has drifted from single key company officers to multiple business stakeholders and buying committees. However, a classic loyalty-generating strategy still works in the digital environment as well as it ever did in wholesale and retail sales in face-to-face encounters. Offering customers in-house accounts for making B2B purchases offers strong incentives for companies to do business with any given eCommerce platform, and software customizations and automations update this classic practice for the digital age of instant communications.

Purchasing on Account Overview for B2B Operators

Purchasing on account is a powerful inducement to encourage sales and customer loyalty, and the process works similarly to offering store credit at the retail level. However, the process actually works more like American Express cards where card holders repay their full balances at the end of each billing cycle. B2B companies that offer their customers credit terms do so for many reasons, and the terms usually specify NET payments within 30 days. Offering credit to online customers has its drawbacks and risks, but back-office customizations can improve the odds of curating successful and profitable long-term account relationships by offering in-house buying accounts. B2B operations can save on payment processing costs, get more comprehensive profiles of their customers, simplify their own administrative tasks when processing orders and encourage greater customer loyalty.

B2B Technology for Managing Customer Accounts

Extending credit terms at the right time in the sales process can foster conversions more efficiently than almost any other sales strategy, and knowing when to deny credit can avoid unnecessary collection costs and write-offs. Technology customizations of B2B eCommerce platforms can simplify and automate these decisions and provide third-party integrations that manage risks such as invoice insurance and invoice factoring for selling credit-worthy invoices in cash flow emergencies.

Software customizations can also generate automatic credit checks of customers, qualify business associates and protect the financial information of customers so that B2B operations comply with DSS and PCI regulations. Today's eCommerce platform provides many versatile functions for customers when companies develop the right custom features and automatic processes to promote business. Few areas can provide greater returns than offering customers purchasing accounts that facilitate multiple ordering needs and satisfy one overwhelming concern that every B2B customer has to some degree -- anxiety about paying for products before receiving them. Software integrations and customizations organize efficient qualification processes and investigation workflows, optimize collection processes, speed credit decisions, manage risks, synchronize account management, protect confidential financial information, streamline invoicing and monitor customer information in real-time over the course of the business relationship.

B2B back-office automation for billing and qualifying customers for purchasing accounts simplifies the entire process of invoicing, generating customer loyalty, encouraging faster payments and offering standard 30-day NET credit terms or longer financing periods for companies that have seasonal sales fluctuations or special billing needs. Offering these accounts generates major benefits in four key areas that include customer convenience, sales convenience, ordering convenience and greater customer loyalty to the business brand.

1. Customer Convenience Integrations

Purchasing accounts offer many benefits for B2B customer that include empowering employees, business associates and company stakeholders to log-in to parent accounts and order goods and supplies without dealing with any payments. Customers can set limits for each user, issue purchasing or procurement cards to staff or just authorize the workers directly with the B2B company based on a check-in code, ID card or other mutually agreed authorization method. Staff can then make purchases directly with the B2B supplier without accepting any responsibility for paying the bill like an authorized user of a company credit card.

Other conveniences of B2B purchasing accounts include simplifying the ordering process when companies use a purchase order system to place orders. The rules, proposals, negotiations and final authorizations can become complex, but B2B companies can handle these costs of doing business easily with digital tools and back-office customizations.

Companies that buy invoice insurance can offer credit terms without risk, and the benefits for buyers include simpler ordering, ability to place larger orders, faster order fulfillment and a clear process for delegating buying tasks to staff, stakeholders, branch offices and departments.

Back-office customizations manage authorizations, send automatic reminders, initiate collection efforts, integrate regular credit reports and help company decision-makers to manage risks and develop sound business practices that provide customers with extraordinary conveniences in their ordering processes and abilities to place orders, take advantage of bulk discounts and develop great partnership-level working relationships with the B2B company.

2. Sales Convenience Customizations

B2B companies get many benefits from the house accounts, and these include selling larger orders, streamlining the sales process when salespeople don't need to deal with payments, simplifying collection efforts and obtaining financial information for more personalized sales strategies. B2B companies learn more about each of their customers during their credit investigation process than is commonly gathered from buying behavior alone, which allows each company to personalize marketing, learn who are the major decision-makers of the company, estimate a given company's financial resources and collect other actionable business intelligence. Easy access to credit encourages higher sales, persuades buyers to take risks on unproven products and creates expanded sales and marketing opportunities in areas that were previously considered too risky. Invoice insurance, credit accounts and loyal buyers can make tapping these opportunities more appealing.

Streamlined Invoicing

House accounts can be customized for each authorized buyer, store location and line of products. B2B companies can design more complex interfaces and user experiences based on greater financial and personalization information that's available for companies that apply for purchasing accounts.

Customizing Complex Buying Processes

Buyers with house accounts are easier to shepherd through complex buying processes such as purchase-order systems, gaining multiple approvals for business buys, authorizing multiple account users and developing long-term relationships and business partnerships. Many B2B companies are moving toward using their platforms as marketplaces for multiple vendors, manufacturers and B2B sales companies. Offering house credit is a good first step for positioning a B2B company at the top of the chain for this forward-thinking business strategy. When companies share financial interests, it's easier to work together from shared marketing platforms.

3. Fulfillment Convenience Applications

Customers enjoy faster processing of their orders when they've been qualified for an account because no immediate payment arrangements are necessary. B2B companies have all the information they need to ship immediately, and customers with accounts generally provide more complete information about their companies, buying habits and financial strengths so that eCommerce platforms can segregate them with higher degrees of accuracy. When salespeople know a company's limits, they can better target their sales efforts.

Gartner predicts that personalization on B2B eCommerce sites will enable companies to outsell their competitors by 30 percent by 2018, and offering customers purchasing accounts delivers the kind of personal service and easier ordering that ensure marketing success.[1]

Cross-Channel Marketing and Faster Fulfillment of Orders

Account holders deliver a wealth of actionable information that leads to faster order fulfillment and ongoing inventory replenishment to optimize these customers' regular ordering habits. Over time, aggregations of customer ordering habits deliver deep analytical insights for developing cross-channel marketing strategies, understanding each customer's needs and customizing the fulfillment process for even greater efficiencies such as scheduling automatic orders, arranging shorter delivery journeys through warehousing and supply chain management and offering qualified customers third-party financial services for business expansions.

4. Increased Stickiness Convenience

Stickiness or lock-in is business terminology that refers to how strongly an existing customer's use of products and services "sticks" with an existing company instead of migrating to a competitor, and it's a critical benefit for B2B eCommerce platforms where developing long-term relationships is an expensive and drawn-out process. The same holds true for B2B customers who have account privileges. Customers don't want to go through the process of finding new vendors that provide a similar level of service, automated processes and simplified processes for placing multiple orders that only require one payment every 30 days when arrangements are made for monthly billing.

Account Statistics to Change How You Think About Offering Credit

Many B2B companies fear offering accounts when business customers have many payment options, and others worry that they're subsidizing their customers with interest-free loans for 30 days. While these fears are valid to some extent, there are many ways to mitigate the risks to acceptable levels, and in-house purchasing accounts generate real competitive advantages. Today's eCommerce platforms function as business partners for their customers, and helping them succeed increases a B2B company's sales and success.

Statistics show an increasingly favorable lending climate for SMB, and big banks are making more loans and alternative lending is increasing, so offering B2B credit makes sense in the current market.[2] Although one study by Atradius found that American companies encounter some problems getting paid on time, only 50 percent of businesses bother checking business credit worthiness.[3] Payment terms average 28 days, but payments average taking about 48 days. However, assessing fees and interest for late payments, carefully using modern tools to check and monitor credit continuously and using best practices for risk management ensure that companies have little to fear and much to gain from offering their best customers purchasing accounts.

Credit Insurance and Risk Management Integrations

Risk management is certainly a concern when granting trade credit, but the risks are no more unmanageable or expensive than other areas of risk for which companies routinely buy insurance. Insurance companies typically offer invoice insurance to mitigate the risks of nonpayment, and these companies usually require a dynamic partnership with B2B companies that allows them to set credit limits and investigate new customers before insuring them. Back-office third-party customizations and integrations can optimize risk management for B2B companies and leverage the third-party services of expert insurance investigators from around the world to qualify prospects, set limits and cover any losses on credit accounts.

Tips on Offering Customer Accounts from B2B eCommerce & Integrations

B2B eCommerce & Integrations doesn't qualify prospects or make specific recommendations for granting credit, but our experts can customize your software so that your company's risk management team can do these jobs or enlist third-party support in the process. Managing credit accounts, storing financial information and running credit checks generate difficulties for B2B organizations unless they have fully integrated back-office features to manage the process and provide secure storage, limited access to financial information and robust business tools to manage customer relationships, credit processes and collections. That's an area where we excel, and we'll work with your IT and credit staff to design a system that automates these processes with all the essential security protocols needed to satisfy regulatory agencies and insurance providers. We can design a world-class accounts receivable management system that ensures collectors and sales staff follow all your company's collection procedures and industry best practices for granting credit, ensuring payments and meeting collections regulations. Call or contact us today to find out more about the advantages of offering credit accounts to your customers to generate more sales and build customer loyalty.

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B2B Shipping and Handling Integrations Deliver Greater Functionality

Among the most popular and critical integrations that any B2B company can offer its customers are shipping and handling tools for calculating sales taxes in foreign countries, managing customs and duties, simplifying split-shipping and drop-shipping and connecting directly with carriers for complex shipping needs. Unlike B2C websites, versatile business platforms that sell to other businesses don't just ship by the big-three shippers: FedEx, UPS and USPS. B2B companies ship by trains, planes, ships, and trucks, and many companies use two or more carriers on each shipment to a singular address. Buyers also ship products to multiple stores, choose different shipping strategies based on inventory locations and often need to arrange logistics for storing products when they have to remain idle between carrier pickups. All these variations create a complex supply chain for B2B companies and their customers, but both can manage their shipping professionally from a single platform -- a B2B platform that's been customized for shipping.

User-friendly features like shipping integrations are increasingly important for B2B platforms. B2B buying decisions revolve around complex customer needs and concerns, so offering digital tools and integrations are increasingly employed by B2B organizations that receive impressive returns on their investments such as 10-percent growth rates in new customers and 20-percent faster deal conversions.[1] Shipping and handling integrations can play critical roles in achieving these kinds of results. The benefits begin as soon as customers log-in to their accounts where they can review their ordering histories, view and print invoices, access custom shipping reports, connect with carriers directly and perform other shipping-related tasks. These include:

- Tracking shipments, viewing waybills, submitting freight claims and checking shipping schedules
- Calculating shipping charges for large and complex orders
- Calculating state sales and use taxes where applicable
- Performing currency conversions for foreign shipments
- Automatically calculating customs and duties for any country
- Retrieving bills of lading and proof of delivery
- Submitting claims for shipping damages
- Viewing real-time rates and updated inventories across warehouses and distributorships
- Managing drop-shipping and split-shipping
- Requesting special price quotes for special handling, hazardous materials and products that require special shipping methods such as flat-rack or open-top containers
- Receiving instant updates on shipping prices
- Generating real-time order tracking updates
- Comparing freight rates from dozens of carriers
- Streamlining and automating freight shipments

- Arranging for recurring orders to be scheduled automatically

B2B Company Benefits of Shipping Integrations

B2B companies benefit tremendously by offering their customers API integrations of the most popular carriers including trucking carriers such as DHL Global, Conway, YRC, UPS, FedEx, DayTon Freight, ABF, R&L, Super Regional and more than 200 other companies that offer shipping APIs for B2B shipping integration. Scalable B2B eCommerce platforms can add as many of these direct integrations as desired based on their customers' preferred shipping methods. Business benefits of customized shipping and handling capabilities include better integration with inventory management and CRM systems, ability to print shipping labels with carrier-specific labels, better order tracking, faster fulfillment processes and automation for customer self-service that frees staff from time-consuming manual shipping duties.

1. Split-Shipping Integrations

Split-shipping is probably the most popular of shipping integrations because purchasing managers routinely purchase products for chain stores and companies with multiple offices and divisions including items for resale and business supplies. It's common to negotiate bulk prices or custom rates, but the actual deliveries can be split among dozens or hundreds of addresses. Split-shipping integrations can remember all these addresses, keep track of shipments by address and products, prepare correct shipping labels for fulfillment and deliver many other offering efficiencies for both customers and the B2B company.

Split-shipping can be labor-intensive without customized split-shipping tools, but the challenges for B2B companies is to design a user interface that can manage the process seamlessly. When customers also want special price quotes for custom handling or unusual shipping requirements, split-shipping can become even more complex. Fortunately, most freight companies can provide APIs or application program interfaces that provide direct connections with them so that customers can negotiate and compare prices, pull data from multiple shipping scenarios and get instant prices and delivery schedules. These integrations also allow customers to track their orders directly from the B2B platform, so they can follow the shipping journeys of hundreds of shipments from the same convenient user interface or customized dashboard.

Better In-House Fulfillment Using Split-Shipping

Usually, drop-shipping integrations handle shipments that require using other distributors, vendors and manufacturers to fulfill large orders. However, it often makes sense to arrange shipping from multiple company warehouses where inventory is stocked and ship the products separately by using split-fulfillment.

2. Custom Handling

Shipping integrations for custom handling might include special shipping instructions, custom packaging, automatic alerts about how full shipping containers are and widgets that retrieve information on package, case and pallet sizes and auto-calculate how many pallets are needed for different product counts. Customers can calculate small-freight orders for LTL or less-than-truckload shipping by connecting with many carriers that specialize in delivering LTL orders at competitive prices. Many carriers charge extra for special handling, providing delivery notifications and handling orders with special care. Customers can review the price differential, compare carrier prices and choose shipping options and carriers more intelligently.

3. Warehousing Management

Many companies stock their inventories in multiple warehouses, which are often in different regions to facilitate faster global shipping. Keeping track of real-time inventory counts in multiple locations is the first difficulty that this practice generates for B2B companies. Customizations can update orders in real-time and estimate delivery times for order fulfillment when items aren't in stock in sufficient quantities. Customizations can also provide customers with increased shipping options by optimizing warehouse fulfillment strategies to get the lowest shipping costs and managing split-shipping based on shipping to different addresses from the closest warehouse.

Benefits of Customized EDI

Electronic data interchange or EDI can support many warehousing customizations that optimize warehouse management, help customers avoid premium freight charges on expedited shipments and track orders more efficiently for greater transparency and visibility. Custom features for customers might include delivering advanced shipping notifications to warehouses and improving supply chain management for environmentally conscious customers who are looking for low-energy SMART shipping options, environmental sustainability and ethical sourcing in the supply chain.

4. Drop-Shipping

Many of the larger product vendors -- especially those with large product lines or regional and global offices -- don't stock all their products in company warehouses. Some companies manufacture products only after receiving orders for them, and some vendors customize products to order. These situations present challenges to B2B sales platforms that want to offer their customers the fastest possible order fulfillment. However, a platform with robust shipping integrations like drop-shipping management can send part of the order based on what's in stock and arrange later fulfillment of the remaining order. Known as drop-shipping, the missing products can be ordered, shipped from vendors directly or rounded up from diverse warehouses, distributors, vendors and manufacturers. These company business associates usually ship the order to the customer directly.

Drop-shipping integrations can post these orders to the company's ERP system, track what's shipped directly and send a fulfillment request order to the vendor, supplier or manufacturer. The integration can even be programmed to reorder the product for the B2B company’s inventory. The supplier can then send the order directly to the customer and replenish inventory or arrange production of the order and ship the products as soon as they’re ready. Even though the vendor ships the products, they still bear the company's label. Drop-shipping can be an accounting nightmare, but back-office integrations automatically update the figures in inventory management and accounting and generate the necessary invoices to apportion the order to each party's account.

5. International Shipping Conveniences

International shipping generates many special needs such as calculating VAT and other tax rates, printing labels in different languages, handling multiple currency conversions, adding customs and duties, qualifying shipments to breeze across international borders, declaring relevant information to each country's customs officials to obtain clearances and managing international logistics when shipments are to be transferred to other carriers and need to be stored securely between stages of the journey.

International shipping generates headaches for any buyer and B2B organization, but B2B customizations can cut through the red tape faster than a fading celebrity who's invited to cut the ribbon at a high-profile event. Some popular customizations might include variations on any of the following features:

- **Language Barriers**
  Translate shipping itineraries, customs registrations, routing information and other documentation.

- **Returns**
  Product returns can create complex situations that are affected by local regulations on returns, local import-export laws and other variables.
- **Customer Service Issues**
  Buyers and B2B sellers face their own customer service problems that can be complicated by needing to address problems in a foreign language and a different culture. Customizations can connect to international service desks to manage CRM in other countries.
- **Payment Difficulties**
  Currency conversions aren't the only problems caused by accepting international orders. In many countries, fewer percentages of the population use Visa, MasterCard or PayPal, so websites might need expanded ways for customers to pay for their orders and shipping charges when using a foreign-based carrier. Another concern is that prices involving other currencies are always estimates until the order is actually processed due to fluctuating exchange rates.
- **Registration**
  Do B2B companies and customers who ship their orders internationally need to register in each country where they do business? In many case, the answer is yes. Customizations can provide this information automatically.

6. Dimensional Weight

Popular shipping companies UPS and FedEx recently adopted dimensional weight pricing for shipments which requires a complex formula to determine actual weight, package size and billable weight based on extra charges for large-volume packages of smaller weights that take up more room on trucks. B2B companies and their customers can use shipping integrations to generate the right prices for shipping large orders in an instant, but the tools can also be used to research ways to reduce costs by changing package sizes, packing items more efficiently on pallets and even negotiating with carriers that charge shipping costs based on dimensional weights. Carriers compete with each other, and many of these companies will negotiate special shipping rates for larger and recurring orders.

7. Other Shipping Integrations

Many custom shipping integrations are possible with customized software and development. These include customized user interfaces that let customers know how full their shipping containers are based on dimensional weight information on products and shipping container sizes and options of specific carriers. Tracking, scheduling and transparency are very important in the shipping process because customers might want to determine their shipping strategies based on when products arrive so that staff will be available to receive, process and unload the order. Customizations can arrange high-degrees of delivery accuracy so that customers can optimize their use of business resources. B2B companies can make each shipment more streamlined, predictable and accessible. Other custom efficiencies include using multiple regional carriers instead of a national or international service, planning deliveries based on speed and cutting costs by scheduling the cheapest options.

Tips on Shipping and Handling Customizations from B2B eCommerce & Integrations

Shipping and handling issues concern every B2B buyer and eCommerce platform that sells products to businesses, and shipping and handling integrations are among the most important customizations your company can offer customers. The B2B eCommerce & Integrations team has years of experience customizing these features for B2B companies, and they know how to develop customizations that satisfy new dimensional weight calculations and provide custom capabilities such as pulling in document signatures and corroborating photos as proof of delivery. Our engineers can tap the API layer of back-office operating software to integrate as many carriers as is practical so that your customers can compare prices, arrange complex deliveries and track shipments with greater efficiency. Call or contact us today for a price quote or consultation on shipping and handling customizations.

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Collecting Sales Tax with Back-End B2B Integrations

B2B companies often don't worry much about collecting sales taxes because they usually sell products for resale, so they usually aren't required to collect tax. There's also the global scope of eCommerce B2B sales that complicates the sales tax picture. However, things aren't that simple anymore. The constantly changing sales tax picture, which was often ignored in the earlier days of Internet sales, has evolved into a major source of income for tax jurisdictions throughout the world. The more that online sales increase, the more aggressively tax authorities are moving to close Internet-sales loopholes and ensure sales and use tax compliance.

The tax picture becomes tremendously complex because some states charge sales tax based on destination addresses while others charge based on the seller's address in their jurisdictions. Some states have different tax rates depending on the county, and many states require that all orders shipped to their states pay use taxes that match their applicable sales tax rate. B2B websites can be ethically bound to collect these sales taxes despite the fact that it's the buyers who legally bear the responsibility of declaring and paying any unpaid sales taxes. Fortunately, B2B back-office customizations can handle these complex sales tax calculations, determine the current tax rates in each state, calculate taxes in countries where B2B companies do business and handle an astonishing range of tax-related functions.

A Sales Tax Primer on Website Sales

The retail sale and leasing of goods are generally always taxable in every state except the five that don't have state sales taxes: Alaska, Delaware, Montana, New Hampshire and Oregon. However, Alaska and Montana grant taxing authority to localities, so local taxes might apply. In general, B2B products sold for resale aren't taxable, but B2B equipment and products used in business are subject to sales tax. In some states, sales tax rates can vary among cities and localities within each state.

Origin-based sales taxes depend on whether a particular company has any kind of legal presence within the state such as a physical address, employees who work for the company, ownership of intellectual property registered in the state and other precise legal definitions, which can actually vary slightly state-by-state. Some states charge taxes on the sale of services while others don't, and many charge service taxes at different rates than for physical products. Other sales taxes can go by different terms such as RTA tax, stadium taxes or local tax surcharges, and many localities impose education taxes that benefit local school districts.

Origin-based tax states -- such as Tennessee -- base their taxes on the city where products are sold, but Tennessee and most states switch to a destination-based model for out-of-state companies that sell products within the state. Called use taxes, these assessments on out-of-state Internet sellers mirror the rates charged for sales taxes in the relevant states.

All these complicated taxing guidelines create an accounting and billing nightmare, which is why so many B2B companies have just ignored collecting taxes in the past because the bulk of their sales were nontaxable on resale items. However, eCommerce companies -- both wholesale and retail -- can expect greater compliance efforts as states crack down on this source of revenue. Now that companies can easily integrate complex tax calculators into their eCommerce platforms or accounting software, they have little excuse to plead ignorance of the law or undue hardship in calculating taxes correctly. States are beginning to step up enforcement efforts by targeting larger companies, but small-to-medium-sized businesses will quickly follow. Getting websites customized to make these calculations is simply sound advice and good business practice.

To Collect or Not to Collect

Many B2B companies have never collected sales tax while others collect it only if they have a physical location and business customers who regularly buy equipment, supplies and products used in business or offices. Although companies from out-of-state can can collect taxes for other states as required by law, there has been no legal mandate to do so except within the states where companies operate. That may soon change because of The Marketplace Fairness Act, which is pending in Congress in 2016. The new law would make collecting sales taxes mandatory in the 45 states that have sales taxes. B2C and B2B companies would be legally required to collect these taxes according to each state's tax rates, and standard laws, fines and penalties would apply in cases of noncompliance. States can treat cases where companies collect the taxes but fail to forward them to the tax authorities as embezzlement.[1]

Deciding whether B2B companies should collect taxes could take up pages without coming to any hard-and-fast conclusions. The best answer depends on what B2B companies sell, how much of their inventory is generally for resale and how much of what they sell is strictly used in business operations. The short answer is that if a business operates within a state, then it must collect tax for items that aren't commonly resold. It seems likely that the Marketplace Fairness Act or some variation of it will eventually pass as states increasingly complain about tax loopholes in digital sales. Until such time as companies are legally mandated to collect sales taxes, B2B companies can choose to collect taxes or not on out-of-state orders. However, it's a good idea to prepare for the possibility, and since companies must collect taxes within the states where they operate, it's not much more difficult to customize software to handle taxes in all the states.

Determining How Much to Collect

Determining how much tax to collect manually would be a nightmare for the staff of a busy B2B eCommerce platform that commonly sells supplies, business equipment and items for resale in all the states. Generating invoices and fulfilling orders would languish until staff could examine orders and consult tax tables, connect for updates and determine which products fall into certain categories. Each state has its own regulations, exemptions and taxable items, which makes accurate manual calculations nearly impossible. For example, Texas, which has one of highest sales tax rates, normally taxes products at 8.25 percent but charges 66 percent of that rate for services. Every county in the state also has a different tax rate based on a local tax option, so companies would need to determine which county each customer is actually from, a daunting task when dealing with lots of Texas orders.

The problem becomes magnified when orders consist of taxable and nontaxable items, drop-shipping where items ship from different locations, some of which might be in the state and some of which might be outside its jurisdiction. Split-shipping introduces an entirely different level of uncertainty when bulk orders are shipped to hundreds of separate store addresses. These orders might go to different countries, states, cities and counties and have different product distributions that might or might not be taxable and other variables.

Custom tax calculating APIs are available as stand-alone applications and API additions that can be integrated into B2B websites to calculate taxes accurately. B2B platform customizations might be needed to route the information where it's most needed in ERP and CRM software, add special features like ZIP code and street address lookups and other customizations. Avalara is one of the most accurate and popular APIs because it calculates taxes precisely based on ZIP codes, verifies addresses and checks tax rates through real-time connections with the relevant taxing authorities.

Sales Tax Collection with Rate Tables

B2B companies that have fewer taxable sales and don't want to pay a premium for a real-time API integration often opt for rate tables, which are less expensive, that plug into the API layer of order-calculating software. These can be used for years and updated with new rate tables. However, it's likely that transactions will occasionally be off by a few pennies or dollars depending on the size of the order and the tax rate. However, since there are no fees per transaction when using this method, decision-makers feel that paying a little extra to make up for tax errors is a bargain.

Ensuring Accurate Sales Tax Collection

There were more than 6,500 changes to sales tax rates in U.S. counties last year.[2] It's really impractical -- and impossible -- to keep up with all these changes manually for multiple orders and jurisdictions, which is why states haven't pursued collections in this area in the past. States got better results auditing local, registered companies that could be taken to court and fined for noncompliance. However, integrating a real-time API to calculate taxes now makes it possible for any company to charge the right sales tax. These integrations are so efficient that they can even file IRS returns, state taxes and sales and use tax returns for eCommerce platforms. Larger B2B companies and those companies that sell to businesses that have ties to government agencies are better off to pay the small transaction fees to automate accurate tax calculations and foster an image of professional competence.

Business Benefits of Sales Tax integrations and Customizations

Customers can use customized back-office integrations to research tax rates for their own needs, which makes their B2B platforms more valuable to them. Customizations can generate sales tax reports by state, county, products and other criteria. Customers love the fast calculations no matter where products need to go in complex shipping strategies that involve split-shipping and drop-shipping applications. Back-office fulfillment speeds are almost instantaneous with real-time tax calculations and automatic designations of taxable and nontaxable products.

Customized features can also manage the administrative duties associated with sales tax collections such as connecting automatically with tax offices, preparing returns, forwarding taxes electronically and managing documentation such as customer resale certificates issued by the state, which should be updated each year but often are never collected, updated or kept on file.

International Taxes Like VAT

B2B sales in the European Union are tremendously common U.S. eCommerce companies, and EU members use Value Added Tax or VAT, which is added to the price of goods and services. The laws for paying these taxes on digital sales to Europe have been in place since 2003, but new regulations have changed the picture and might require a B2B company to collect VAT. Although VAT is collected throughout the EU, the tax rates have ranged from 1 percent to 27 percent. Before 2015, companies could sell through a Luxembourg exchange and only charge the minimum of 1 percent. In 2015, companies must charge the tax rate that applies to each delivery address.

Of course, most B2B companies aren't affected if they only sale goods for resale. However, products used in business operations and as gifts or incentives are subject to VAT. Companies doing business in the EU face the unusual complication of adding VAT to product prices and forwarding the taxes to the appropriate tax authority. There are minimum sales thresholds and exemptions for food and children's clothing, but these seldom apply to B2B companies. Other countries have similar tax situations and customs and duties that must be calculated, collected and forwarded. B2B customizations can manage these calculations effortlessly by connecting with the appropriate tax information through the API layer, getting the latest information, applying the taxes, making entries in accounting software and generating reports. Even companies that don't currently sell in Europe might expand into this lucrative market, so getting the technology in place during platform development could make expansion a more attractive option. It's always important to build a platform that can grow and adapt.

Tips About Sales Tax Collection from B2B eCommerce & Integrations

The world is rapidly becoming a single marketplace, and getting your B2B website ready to sell anywhere and anytime makes a sound financial strategy. At B2B eCommerce & Integrations, we can develop customizations that make national and global B2B sales as simple as selling products from a neighborhood store. We can install intuitive systems like Avalara that can provide real-time address verifications, determine tax rates by ZIP codes and ensure that your business is always in compliance. We also understand how valuable these tools can be for speeding order fulfillment, making accurate calculations and forwarding the information to inventory and accounting. Call or contact us today to find out more about back-office sales tax integrations or request a custom price quote based on your B2B eCommerce development needs.

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Solution Architecture to Suit B2B Integration Needs

Today's big data explosion, increased business applications and cloud-based technologies have quickly marginalized older infrastructure and deployment architecture. What worked well for years can no longer keep up with increased processing speeds, proliferating mobile marketing demands, security concerns and thousands of potential APIs that integrate in a B2B operating system's API layer. Website architecture deals with three critical elements in today's B2B eCommerce platforms: aesthetic, functional and technical design. Site architecture is designed to focus on each website user's needs and deliver reliable connections and navigation while ensuring that the platform's business needs are also met.

Why Site Architecture Is Important in B2B Applications

Site architecture defines the site's ability to generate responsive layouts, provide access to search engines, connect with third-party integrations and process website visitors. When users arrive at a website, they typically have questions that the site's display should answer in just a few seconds. These include:

- Is this the right place?
- Does the site offer what I want?
- Is this product or option better than what I had in mind?
- Does the company appear to be reputable?
- Does the site satisfy my sense of design and style?
- Where do I go next?

Site architecture is designed to answer these questions, guide the visitor to website areas where they can find what they're looking for, get answers to questions, become intrigued by links, related products and user-friendly features and take actions to satisfy needs. Information layout is designed to assuage anxiety, convince people they're in the right place, build trust and elaborate on what the business can offer each visitor.

Why Your Deployment Architecture Needs Adjusting

B2B platforms no longer function as simple online business cards or static websites but empower an incredible array of user-friendly features such as adjusting to the device each visitor is using, personalizing displays for customer personas, suggesting intuitive navigation recommendations, providing targeted internal catalog searches, generating custom order forms and connecting to research and customized features. Menus and display content need to offer global site navigation, popular search buttons, quick-connect buttons and other simplified navigation tools and other functional features that are easy-to-find and clearly visible on small screens.

Best Practices for B2B Site Architecture

Each B2B organization has different features, customer demands and data processing needs that are complicated by increased mobile access and the greater processing needs that increased Internet access generates at all hours of the day. Explosive growth in processing speeds for handling data from multiple databases, new applications, business services and cloud communications puts strain on aging service-oriented architecture or SOA. Data is time-sensitive and loses value after even minor delays. For example, delays are common when business applications search through social media or third-party databases for actionable insights. Multiply any slight delays due to inefficient architecture by all users, all website features, all internal process and all stakeholder activities. The result is real-time processing delays that slow page loads and produce other inefficiencies that cause users to migrate to different sites. Conducting an audit of B2B hosting, scalability and SOA issues is important when building any B2B eCommerce platform or planning a project to upgrade and expand business capabilities.

Hosting Capabilities

Each B2B platform has many parts, and any upgrade, project or new implementation begins by examining the underlying deployment architecture and its many related elements. Performance and security issues need to be considered when reviewing site architecture and hosting issues. Older SOA configurations and inadequate designs become increasingly vulnerable to processing delays and leaks of confidential data that could result in legal issues. When adding new B2B capabilities, these risks increase, so decision-makers should review where their site is hosted because location can have critical performance and security implications. Most companies locate servers or site hosting based on budgetary concerns or their IT teams' preferences, but they shouldn't. The following issues are more important when determining hosting location and other details like architecture configuration:

- Proximity to areas where most site visitors are located
- Daily, weekly, monthly and seasonal traffic patterns
- Type of user experience that the company wants to offer
- Number and types of associated files that visitors will access and download such as graphics, videos, brochures and price lists
- International marketing and shipping requirements
- Where companies store their operational systems such as CRM, ERP, back-office applications and Inventory Management systems
- Plans for backing up data and disaster recovery

Decision-makers need to consider whether their hosting choices support many processes, faster customer access and steadily growing customer volume and new applications and customer support services such as content delivery networks or CDNs, which are a series of servers used to deliver content based on each user's geographic location.

Expandability

Consider where the business and explosive growth might take the company in just five years. Once a hosting location is determined, the architectural decisions can be enhanced, modified and upgraded if the hosting location supports expandability, but other issues should be considered. Decisions made due to costs could easily backfire in this scenario because expanding the platform's capabilities becomes impossible or cost-prohibitive. Even those companies that choose a relatively expensive solution with many licensing and transactional fees face issues. Company decision-makers might learn to live with high transaction costs and eventually forget about what they’re paying. However, when those companies want to expand or add a load balancer, they find that they must pay an additional $50,000 license fee. It's critical to understand the performance, expandability and security implications of choosing a hosting location, but it's equally important to know what future expansion will cost.

Other B2B Platform Concerns

Some companies begin business operations by hosting their internal systems on-premises such as ERP and CRM. If hosting CRM applications in-house, it's common to migrate to the cloud later as the business grows. Unfortunately, this change compromises site architecture and can seriously affect integration issues when the CRM system is online and the company’s operating ERP system is on-premises. That's why it's so important to choose a B2B platform that's capable of handling the company's current infrastructure needs and is easy to expand for business growth and increased processing needs as they develop. Get things right now, and companies can build a platform primed for growth and expansion.

Functional Architecture Design

How companies choose to configure deployment architecture for better functional design affects everything that a B2B platform does. Upgrades, modifications and platform rebuilds can disrupt business instead of enhancing it, but the right solution architecture generates a fluid process for development and carrying out regular business operations, launching new projects, integrating new features, handling routine maintenance and other B2B platform responsibilities.

Does Functional Architecture Design Pass the Smell Test?

Today's enterprise-level eCommerce platforms serve many stakeholder, internal staff and customer needs, but many companies are dealing with these issues from a weakened position and a big handicap -- inadequate functional architecture design. B2B eCommerce has evolved beyond what Internet developers ever envisaged when computer technology first came online for common usage, and technology advances, exponential increases in databases, evolving marketing needs and increased mobile access have created an environment where companies can feel that they’re stuck with old infrastructure because they don't want to risk going offline to upgrade their capabilities. One Forrester Research survey found that 66 percent of B2B IT managers had difficulties exchanging information and that 63 percent reported problems when trying to add new trading partners.[1]

There are many potential solutions based on SOA strategies that segregate and consolidate functions for local functions, development environments, staging and testing. The following configuration, which was designed by Clarity Connect, is well-conceived and designed to optimize B2B processes:[2]

- Clarity Connect designed architecture that allows its API layer to reside behind the firewall at MCI and simultaneously within the staging area.
- This configuration supports expanded staging options and integrations with external connections simultaneously.
- Clarity Development and Local Environments can access the Connector securely for security-driven operations.

- Data is continuously synced between the CEF and CRN/AX by using the connector to queue this interaction.
- MCI business rules apply within the Connector for business logic, mappings, etc.

That's one example of how custom architecture design can create a platform that supports business processes, external integrations, security concerns and a range of B2B eCommerce needs with a common toolset while incorporating modern solutions for onboarding business associates, adding new transaction sets and validating and confirming data without interrupting the regular flow of business.

Tips on Deployment Architecture from B2B eCommerce & Integrations

Enterprise architecture offers B2B companies an extraordinary degree of latitude in their operations to conduct regular business, expand and develop new features for the rapidly evolving technological and social trends and best practices that eCommerce companies need to adopt to stay competitive. B2B eCommerce & Integrations can help you build the kind of business that can boldly go where others are forced to follow. Our experience will guide you in configuring an architecture solution that supports a multilevel platform, trading partner requirements, new B2B protocols, noninvasive integrations and multichannel interoperability. We'll work with your team to develop an architecture solution that fits your needs precisely today while supporting easy future expansions. Call or contact us today for a consultation on deployment architecture or a price quote.

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How to Build a High-Performance B2B Development Team

Once the decision has been made in favor of development, decision-makers need to choose a vendor, assign staff members to the development team and possibly hire staff in some cases or bring in outside consultants to manage the process. The key to success is hiring the right vendor and internal staff, which is simple in theory but difficult to execute. The goal is to hire effective followers who are leaders capable of following directions and working with others across multiple communications channels. Some people communicate well only verbally while others shine in written communications. In the digital ecosphere, there are many tools to foster communications, so as long as prospective development team members can communicate, understand the work required of them, possess the requisite technical skills and arrange ways to communicate digitally or in-person, then geographic, cultural or language barriers aren't deal-breakers.

Choosing Team Members from Existing Staff

Most B2B companies choose development teams from existing staff members in the back-office or front-end services. The development team will certainly need to be familiar with any existing back-office software, accounting systems, company infrastructure and its order fulfillment processes. Back-office staff members usually have this knowledge and might include an IT person, company stakeholder, system administrator or a quality control supervisor. Depending on the project’s complexity and proposed capabilities for the platform, decision-makers might want to assign front-end salespeople, managers, CRM specialists or company executives to the team.

Hiring Insights

If the company doesn't have an IT team in place, it's an essential first step to hire people for the job. Developing a responsive B2B eCommerce platform can handle many business operations automatically but will always require staff monitoring, troubleshooting and administering by an internal team of IT-savvy people, so development team members can take over these jobs after the platform launches. It's in the company's best interests to get that team on-board as early as possible so that they can take part in the development process, train while helping to build the platform and become ready to take over operations after the build is finished.

It's important to have clear objectives when hiring, but don't hire IT staff just to fill one role in development. The best practices for hiring IT staff include hiring people who have cross-training in various IT skills and could work in several areas of development. In fact, most software developers assign members of the development team to work in different areas to get a better understanding of how platform specialities and customizations integrate with other areas of the platform. A weak team member with skills in only one area won't be happy, and the company won't be satisfied with his or her performance. The Economist suggests that bad hires are one of the biggest business problems today, and the Harvard Business Review finds that 80 percent of bad hires result from poor hiring decisions.[1] Best practices for hiring outside team members for a development project include:

- **Hire for the Long-Term**
  Don't hire just for the project but choose multitalented people who can add value to the company after the platform goes live. Customizations mean that nobody knows everything about how the platform will run after development except those who worked on the project, so the development team becomes a valuable resource.
- **Work Experience**
  Look for strong communication skills, educability, drive and ambition instead of particular skill sets. The goal is to create a unique business model, so choose effective followers who can transition to effective leaders after the build. Side projects are often more revealing than work accomplishments, so monitor prospective candidates in social media, blog posts, tweets and other channels to assess what kind of thought leaders they are and whether they're team players.
- **Build a Social Voice**
  One effective option of finding the right people for the job is to let them find the company. Building a social voice and network of business connections can supply a steady stream of prospects who share the company's core values.
- **Sell Job Candidates on the Company**
  Talented IT candidates often change jobs easily because they're in high demand, but many of them enjoy taking part in developing a B2B platform from inception. Sell the virtues of working with the development team and bypassing the seniority chain after development to become a senior company leader. Don't limit selling the company to job candidates but include other members of the staff and development team who might take critical roles in operations after the platform goes live.
- **Follow Companies in the Industry**
  Follow companies within the industry to connect with candidates who have the right skills and industry experience.
- **Research Competitors and Their Connections**
  Choosing people from competitors and their connections offers obvious advantages because they've demonstrated that they work effectively in the relevant business model. This hiring strategy can lead to a higher ROI than hiring people from unrelated industries.
- **Consider Hiring Content Writers and Marketing Staff**
  It's never too early to integrate marketing into the development process. A talented marketer,

writer or video producer can help companies refine content during the development process and communicate information about the platform before, during and after the build.

Meeting with the team, getting new hires familiar with company processes and educating the staff about the platform changes define good leadership and can raise company morale and build excitement for the project. Getting the staff excited is the first step in a grassroots campaign to market the new platform. Forbes reports that 88 percent of B2B marketers use content marketing and that 61 percent of marketers meet with their teams daily or weekly.[2] Involving marketing in the development process is a clever strategy that can yield a rich harvest of benefits throughout development and after the B2B eCommerce platform is built.

Choosing the Vendor

It's not possible to make an omelet without eggs and impossible to get eggs without chickens or other fowl regardless of which came first. Most people don't raise chickens in modern society to ensure a steady supply of eggs for omelets; they just buy them from an egg vendor such as a supermarket, farmer's market or neighborhood grocer. Building an eCommerce platform can be done with the right internal team of specialists, but most companies go to an outside vendor to buy software and customize it for their unique business needs and infrastructure.

Unfortunately, that's where many companies fall short by choosing out-of-the-box software or vendors that are more familiar with B2C operations. Thousands of companies offer website design services, CRM and ERP software, SaaS models, custom software integrations and choices of operating software, eCommerce store builders, Web development, marketing consultations and endless combinations. Building a B2B eCommerce platform, however, requires a vendor that can wear many hats. The vendor should specialize in B2B implementations and have a full staff that can fill any holes in the development team. Requisite skills include experience in marketing, design, eCommerce, business consulting, project management, agile software development and customizing software successfully for today's high-performance B2B eCommerce platforms.

Choosing the best fit depends on many factors, but keys to look for in potential vendors include whether they work well with internal teams and are willing to involve them deeply in the development process. This will ensure that the staff can take over after the platform build with a good working knowledge of how everything works. The vendor should specialize in customizations and integrations because these are critical in today's rapidly evolving business markets where small conveniences and better user experiences more often determine where customers go to buy products than the traditional B2B monitors like pricing, brand loyalty and personal relationships with a company or members of its sales staff.

Regardless of vendor choice, it's important to stress that the development project is a proprietary company effort and that the vendor works for the company. Insist on taking part in the development process, but don't forget to follow through during the actual planning and building of the platform. Some leaders establish control and retreat to their offices while the technical matters are resolved, but this is a short-sighted attitude that everyone will notice. Maintain high visibility during the project even if managed remotely. Ask questions, review progress and read the technical documents that the development team produces. Decision-makers and company officers don't need to understand every technical detail to monitor the process, ask questions, request examples for clarification and stay heavily involved throughout the development process.

Never Relinquish Control

Depending on choice of developer, it's likely that the company will use some variation on the agile project approach to manage the development process, which is a useful way to incorporate stakeholder needs, foster communications, accelerate results and ensure quality assurance and testing throughout the course of the project. The platform developer and project lead will likely schedule its own series of meetings, daily progress checks and regular communications with the client, but that doesn't mean B2B companies should relinquish control or hands-on management of their own development team.

It's important to choose a vendor who approaches the development process as a partnership. After all, the results affect core business operations, and the vendor doesn't need to live with poor results -- the customer does. Maintaining control and participating in every aspect of development are essential, so communicate regularly with the team, monitor the project’s progress, read the development documents as they're written and note any changes.

Best Practices for Managing the Development Team

Regardless of whether the owner or primary decision-maker participates directly in development, he or she needs to reduce other obligations during the development phase. If the team can't find its leader, its members can't report progress, problems, testing results, changes and other relevant developments. Best practices for managing the team during development include:

- Schedule time for individual and group meetings, document reviews, performance reviews and providing direction to the in-house team in addition to the meetings called by the project developer.

- Develop communication standards that provide thorough access to documents, information through direct contact and regularly scheduled face-to-face meetings even if scheduled remotely.
- Recognize individual accomplishments and team milestones to boost morale, incentivize better performance and remind the team who's in control of the project both during and after development.
- Admit when things get too technical to understand easily, but insist on explanations until the basic concepts are understood.
- Develop a good working relationship with the vendor and its development team because it's likely that the company will be dealing with them for a long time.
- Recognize that team unity is no longer restricted by geography, language, culture and time zones.
- Be compulsive about staying in-the-loop because most development projects devote time to communicating their project's status and progress reports through multiple channels, regular meetings and electronic documentation, and effective leaders acknowledge those efforts.

Tips on Building Your Development Team from B2B eCommerce & Integrations

The skilled team members at B2B eCommerce & Integrations have worked together on many projects and collaborated with platform developers, software companies, open source engineers and many models of B2B companies. We have connections with skilled specialists that we can consult and bring to development teams and special projects-within-projects when needed. We also work well with your in-house teams and know the value of building trust and establishing cordial and collaborative working relationships. Call or contact us today for an RFQ, RFI or RFP, which are requests for quotes, information or proposals, or schedule a consultation on how to build your development team.

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Selecting the Right B2B eCommerce Platform Based on Customizable Options

"75 percent of Internet users prefer mobile-friendly sites — including B2B customers — and 96 percent have found sites that didn't function well on mobile devices."

Choosing a development partner for building a B2B eCommerce platform isn't the same as buying a car or even a home when comparing features, design, efficiencies and prices can guide the process. The process of choosing a new B2B platform more closely resembles building a custom home that's easy to expand in the future as a family and financial strength grow. However, the problem of building a B2B platform is that there are so many software options and features -- some of which apply and some that don't -- that complicate the decision. When buying products like cars, it's easy to compare features because they all do essentially the same things, but comparing eCommerce platforms is like comparing apples to watermelons.

However, the primary force in determining which platform to use is really quite simple: How customizable is it? Customizable platforms are scalable, flexible, responsive to design changes, display well on multiple devices and allow planners to integrate vast capabilities based on their industry- or company-specific needs. Such a platform allows B2B companies to build a solution for now and the future, address evolving digital trends and customize Web abilities based on the device that each person uses to visit a website or Web page. The obligation to provide better user experiences, more features, better tracking and personalization will continue to grow in importance as competitors adopt these processes and B2B platforms increasingly become multichannel resources for their customers.

Google reported in 2015 that more searches now come from tablets and smartphones than stationary computers.[1] The United States and Japan lead this trend, but other countries are quickly gaining ground. Managing mobile marketing, developing customized profiles for customers, simplifying B2B ordering, enabling mobile payments and integrating with back-office software from anywhere are just a few of the long-term benefits of customizing a sales platform.

Simplifying B2B eCommerce Platform Selection Criteria

Decision-makers grow increasingly frustrated by the speed of evolving marketing best practices and want to build long-term solutions that adapt, integrate and expand as business increases. Previous experience shows that new developments can generate as many problems as they solve, but customizations simplify the process, provide a better path to training staff and handling problems and often generate error-free integrations. Although the solutions to the operational and marketing dilemma of building a new platform involve many areas that must change over time, one predominant advantage is choosing a highly customizable eCommerce platform. Selecting the right platform makes evolving a routine process, and the best developers involve B2B teams in the planning process of building the business case user interface and user experience, automating and integrating back-office integrations and providing user-friendly fulfillment processes such as custom tax calculators, shipping integrations and processes that haven't yet been conceived.

The right platform should have a robust API layer that allows new customizations and features to be added. This integration layer can add more features than any software currently offers out-of-the-box. Building a strong brand requires strong solutions, and if a company's software isn't up to the job, it's time to consider a major overhaul that begins with platform choice. Customizations can generate sales leads, shorten sales cycles, offer mobile price quotes, move backlogged or out-of-date inventory, connect with customers to build long-term business associations and eliminate ordering errors.

Making a Business Case for Change

Making an organized business case for changing platforms might not be popular among staff members and executive decision-makers who worry about the economy, development costs, planning problems and temporary upheavals that could argue for keeping the current system, but time after time, companies have failed or limited their growth by not embracing new technologies and business trends before younger, technologically savvy customers migrate to competitors who better understand what they want. Think with Google offers some persuasive and compelling statistical insights:[2]

- Almost half of B2B researchers are now Millennials
- C-suite senior executives approve 64 percent of deals, but 24 percent of junior staff make buying decisions.
- Millennials are rapidly moving into influential positions due to their computing skills and understanding of technology and social influences.
- About 57 percent of buyers have already researched a company before visiting a B2B website so monitoring online reputations and connecting through other channels are increasingly important for B2B companies.

Many B2B stakeholders recognize these new realities, however. About 97 percent of marketers admit that more skills are needed in the B2B sector, and 97 percent also reveal that they are doing new things to bolster sales. 62 percent of hiring managers in marketing are focusing on hiring younger staff who better understand new technologies.[3]

Although securing a mandate for change and initiating a business case analysis for changing an eCommerce platforms are difficult, there are plenty of compelling reasons to do so. Best strategies for making a business case for platform changes that enable greater customization include:

- Increasing company abilities to target audiences for personalized marketing, website experiences and multichannel interaction
- Collaborating with business associates and providing customers with access to their resources
- Crafting custom solutions to business problems
- Generating more qualified leads
- Expanding the sales funnel to external links and connections
- Virtually unlimited indirect benefits for greater management efficiency
- Speeding orders, payments, price quotes, custom pricing and targeted marketing
- Exchanging information seamlessly among multiple stakeholders
- Speeding development by adopting an agile project management approach
- Ability to add integrations from open source software, third-party consultants, proprietary customer apps and other technology advances

Proactively Focusing on Solutions Instead of Responding to Problems

It's really a simple matter of finding a solutions provider instead of a service provider. Thousands of vendors offer service, but these always come with built-in obsolescence. In building a business case for change, it's important to follow a logical process that includes:

- Outlining the company's short- and long-term goals and building a brand that can fulfill the company's vision, mission statement, targeting strategy and internal narrative
- Defining immediate operational requirements and desired upgrades
- Estimating development costs versus ROI
- Assessing current and future integration needs
- Choosing the best platform to resolve the quandary of needing rapid customizations
- Planning and implementing an eCommerce makeover

Justifying the need for strategic change is crucial to the strategy, but the best business decisions always fulfill company needs. The first step of building a case for a new B2B platform begins by finding a better solution that offers the following benefits:

- A product that will create a long-term development solution instead of one that provides just a few customizations that are currently popular
- A platform that integrates complex and custom features throughout the organization and its connection channels
- Cost transparency because many providers not only charge licensing fees but also maintenance and transactional fees
- An API layer that allows easy cross-channel integrations
- Solutions that are modular, flexible and scalable

The second step involves delving more deeply into the platform vendor's business psyche or soul. Ask and answer these questions before choosing a platform that will guide a company for decades:

- Does the vendor understand the company's business model and marketing imperatives and have the data to back up those claims?
- How strongly does it appear that the vendor is just trying to sell software instead of finding a solution?
- Does the vendor's team work well with others and allow stakeholder input from internal IT teams, marketing departments, design and development staff and outside consultants?
- Does the vendor insist on doing all the building work despite allowing some degree of design input?
- Does the vendor allow internal teams into the nuts-and-bolts processes of building the platform where they can jointly design and build the platform, learn how to operate it and troubleshoot any problems that develop after implementation?
- How comprehensively do the lifecycle and billing processes manage project risks?

Red flags arise when the answers to these questions show reticence for collaborations, reveal proprietary attitudes about the vendor’s software development processes or indicate hidden agendas. Any of these inclinations might mean that the vendor is playing what essentially amounts to the long business con where the vendor makes its services indispensable and puts companies in digital jeopardy. Without a clear collaborative development process, B2B companies can easily be extorted through increased maintenance costs, burdensome transaction fees and expensive training services. The platform might not be fully customizable and have a built-in expiration date in today's rapidly evolving markets.

Promoting the Value of Customizations

Not all people who are involved in B2B operations are completely convinced of the value of customizations in today's marketing because many companies still operate with purchase orders, proposals, bids and negotiations. However, building the value of a scalable, customizable B2B platform -- regardless of the business model -- can persuade even the most conservative stakeholder when the benefits involve his or her particular area of company operations. Customizable and scalable platforms deliver benefits that cross multiple business channels, internal processes, customer profiles and third-party associates. The benefits of implementing a customizable B2B platform include:

- **Segmentation**
  Strong custom analytics and easy-to-configure reports and metrics allow companies to section their customers by actions, browsing habits, buying behaviors, product preferences and browsing behaviors after they leave the website.
- **Multiple-Channel Connections**
  Connect with customers throughout their Internet journeys to social media, competitors. vendors, distributors and other touch points.
- **Determine Industry Behavior**
  Like individual buying behavior, companies within an industry or B2B classification exhibit shared buying habits, jargon, language use and preferences for product-presentation strategies. Mining this valuable business intelligence provides information to use in marketing, targeting and customizing inbound content.
- **Identify and Convert Sales Leads**
  Even B2B websites that don't offer catalogs of products can use customizations to generate and qualify leads to strengthen sales efforts.
- **Grouping Products into Subcatalogs or Stores-Within-Stores**
  Subcatalogs can accelerate navigation for the most valuable customers by including only items that have been approved, manufacturer-specific products, products grouped by price, products for specific applications and other criteria.
- **Customizing the Ordering Process**
  Providing customized order forms and invoices and recalling financial and ordering information provide customers with better user experiences.
- **Access to Research and Detailed Product Specifications**
  Many B2B buyers enjoy being able to get product information easily from their mobile devices 24/7.
- **Flexible Payment Options**
  B2B customers want to use their preferred methods of payment, which could include proposals, purchase orders and 30-day NET billing, credit cards, PayPal and other payment options.
- **Qualifying Customers for Accounts**
  Customizations allow B2B companies to qualify their customers for accounts, monitor their

credit worthiness throughout the business relationship, get information on company officers, find out who are a company's key decision-makers and vet business associates.

- **Strengthen CMS**
  Customer service has progressed beyond dealing with complaints to ensuring a better website experience, interacting with the customer, implementing proactive marketing strategies and making it easier for customers to request special deals, products, business arrangements and other indulgences.
- **Integrations of New Software and Features**
  B2B customers routinely want to change or upgrade CRM and ERP software and add open source resources to their platform.
- **Third-Party Applications**
  Third-party applications that can benefit B2B customers include carrier-specific shipping integrations, connections to vendors and distributors, industry information, resource libraries, social media, authoritative business websites, third-party finance companies and many others.
- **CPQ Software for Custom Product Pricing**
  Adding CPQ software can provide many benefits that ignite sales opportunities.

Customizations offer something for everyone within a B2B organization, so just as if profiling a customer, advocates for changing the company's platform can tailor their arguments based on each decision-maker's vested interests.

Tips on Choosing the Right Platform from B2B eCommerce & Integrations

B2B eCommerce & Integrations involves your company's stakeholders at every level and routinely offers transparency, collaborative development, case studies and development work through our trusted business associates like Clarity's popular eCommerce platform for business. Our team can make building a platform from inception or integrating a new feature into an existing platform a great development experience that provides great user experiences to each customer and stakeholder. Call or contact us today for a consultation, RFI or RFQ to address your concerns about building trust and cultivating a long-term eCommerce development partner.

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Clarity Can Help

Contact Clarity for a free quotation, product demonstration or consultation about how the company can build an eCommerce solution for your business. Standard eCommerce vendors just won't do when you depend on massive scalability, powerful business intelligence tools, customizable applications and intuitive shopping carts. Your business depends on a suite of tools and features that can handle large catalogs of products and many shipping options. Clarity can strengthen your conversion ratios and provide human intervention at critical times in the sales funnel. You also get the latest support for integrating new applications, marketing efforts and administrative functions.