B2B ECOMMERCE PLATFORM CHECKLIST

A Guide to Choosing the Right Platform

Use this checklist to identify the right B2B eCommerce solution for your brand. Compare the criteria below with the offerings of different software solutions to help inform your decision.

Digital Catalogs & Linesheets

DRIVE ADOPTION, CUSTOMIZATION AND ORDERS

- ☐ Easy drag and drop linesheet creation
- ☐ Unlimited product/SKU support for digital catalogs and linesheets
- ☐ Multiple, high resolution images for each SKU
- ☐ Share immersive 360°images and videos with interactive, close-up details
- ☐ Customizable fields to communicate unique product information to your buyers
- ☐ Flexible designs for product and brand imagery, with section separators and labels
- ☐ Pull in live product and inventory data from your ERP and make it available to brand reps and retail buyers within your digital catalogs
- ☐ Show or hide inventory to different buyers

- ☐ Display eye-catching custom banners to highlight new items, best sellers, or products low on inventory
- ☐ Show color swatches or product images for available colors
- ☐ Control whether or not buyers can download images
- ☐ Custom portals with user-specific views and content to personalize each user's or visitor's experience
- ☐ Flexible product filtering, searching and sorting by available styles, colorways, sizes, and quantity
- ☐ Display custom pricing based on buyer or buyer segments
- ☐ Quick add to cart and order options directly in catalogs and linesheets
- ☐ Export catalogs and linesheets to PDF

Virtual Showrooms

SELL & SHOWCASE PRODUCTS FROM YOUR CUSTOM VIRTUAL HUB

- ☐ Customize your homepage for an immediately engaging experience
- ☐ Easy, grid-based drag and drop creation with preset templates and widgets
- ☐ Present mood boards, inspiration, color palettes, collection stories, photos and other creative assets
- ☐ Present dynamic, shoppable hotspots that includes videos of runway presentations, designer interviews, studio walkthroughs, models wearing samples and more
- ☐ Share shoppable images for lookbooks, digital catalogs and linesheets
- ☐ Show every angle of your products with interactive 360° photography for linesheet, catalog and homepage photos

- ☐ Access our global network of photographers for the finest 360° images
- ☐ Merchandise your products however you see fit
- ☐ Highlight key products, looks, or product bundles
- ☐ Share international sizing charts
- ☐ Allow buyers to view your products by color, season, category or delivery date
- ☐ Share press, company news, campaign assets and an Instagram feed preview

Sales Rep Tools

SELL PROACTIVELY & STRATEGICALLY TO BUYERS

- ☐ Design custom catalogs and linesheets that are personalized to buyers or groups of buyers

- ☐ Email catalogs to your customers to spark sales activity

- ☐ Prepare and send email marketing campaigns supporting one-click EZ orders

- ☐ Track email performance to include opens, click-throughs, and revenue captured from each campaign

- ☐ Highlight and send currently available and future inventory to buyers for more accurate orders

- ☐ Set up freight promotions to be applied during checkout

- ☐ Send buyers whole catalogs or personlized linesheets with a link to purchase to convert proposals into orders

- ☐ Send orders as read-only or editable drafts

- ☐ Add notes to orders or to specific products within orders and share with buyers for future reference

- ☐ Build dynamic distribution lists for campaigns based on location, division, industry and custom fields

- ☐ Easily add new customer accounts, with multiple rep assignment options so each sales rep can view their own customer accounts

- ☐ Filter contacts by country, state and zip code

- ☐ Create sales visuals and collaborate across teams with the whiteboard tool

- ☐ Sell Prebook merchandise, and accept credit cards as payment for initial authorization and to charge at time of shipment

Merchandising & Whiteboards

SELL DEEPER INTO EXISTING ACCOUNTS

- ☐ Build custom catalogs that combine merchandising and storytelling with imagery, photos, press coverage and product details

- ☐ Let retailers shop directly from an interactive presentation, shortening your catalog to order timeline

- ☐ Transform a catalog of individual products into strategically bundled assortments that drive larger orders

- ☐ Show how a collection works together as a whole rather than as individual products to capture more buying budget

- ☐ Collaborate on whiteboards or presentations in real-time with buyers

- ☐ Build vision boards and roadmaps based on delivery breakdowns and other merchandising cues

- ☐ Connect products to live inventory so buyers can place orders directly from presentations

- ☐ Show how products can be merchandised in-store to expand purchase orders

- ☐ Create detailed eCommerce and brick-and-mortar visual merchandising strategies with the Whiteboard tool

Online Ordering

INCREASE ORDERS WITH A SELF-SERVICE BUYING EXPERIENCE

- ☐ Provide buyers with a fully branded and customizable portal, accessible via web, iPhone app and iPad app, so they can easily shop from catalogs and linesheets, merchandised presentations, custom lists or draft orders

- ☐ Allow buyers to shop from ATS inventory to drive reorders

- ☐ Allow buyers to browse, discover and purchase products from any device for an easy pre-booking or in-season ordering

- ☐ Offer flexible filtering of products (by style, colors and sizes), including Search, Sort, Bulk Actions / Multi-Select

- ☐ Send customizable order confirmations with tracking numbers and automated shipment notifications

- ☐ Create custom Excel order forms for buyers to download and upload

- ☐ Allow buyers to see their specific default pricing and discounts

- ☐ Allow buyers to easily review past orders for quick reordering

- ☐ Enable buyers to place reorders from a prior order

- ☐ Support multiple international currencies (31 and growing...)

- ☐ Support for 14+ languages (English, Italian, French, German, Hebrew, Spanish, Portuguese, Russian, Korean, Chinese, etc.)

- ☐ Offer custom payment options by Order Split to assign different payment options for different delivery dates

- ☐ Specify start and end dates to enable special date-based pricing for products

Shopping Cart

CAPTURE MORE REVENUE WITH A 3D CART

- ☐ Allow buyers and reps to view and analyze orders by multiple dimensions, including size, color, and delivery window, before completion

- ☐ Complex and volume pricing rules

- ☐ Automatically calculate negotiated rates and special promo codes into buyers' orders at checkout

- ☐ Real-time calculations of freight costs

- ☐ Edit and update order details within the shopping cart

- ☐ Allow reps to sell deeper into accounts with accurate pricing and order totals

- ☐ Accept all major credit cards or send invoices with NuORDER Payments (no third-party payment providers necessary)

- ☐ Multiple ship to locations

- ☐ Order minimums, maximums, multiple and other rule-based ordering

Order Management

STREAMLINE THE ORDERNG PROCESS & ENCOURAGE CUSTOMER LOYALTY

- ☐ Automated order confirmation emails

- ☐ Customizable workflow for order reviews and approvals

- ☐ Sync orders automatically to your ERP to reduce order entry errors

- ☐ Send and view tracking numbers to keep buyers up-to-date on order statuses

- ☐ Bulk actions for order search, edits, downloads and updates (in multiple formats, including Excel, PDF)

- ☐ Export order summaries or line-item details

- ☐ Make order updates including quantity changes, ship dates and cancellations visible to both reps and buyers

- ☐ Connect to your existing shipping service provider to calculate accurate shipping costs during checkout

- ☐ Reduce shipping fees and streamline order management with dropshipping

- ☐ Real-time inventory deductions as orders are placed

- ☐ Ability to pre-order and oversell inventory

- ☐ Give buyers and sales reps visibility on order status and tracking

Integrations

CONNECT YOUR B2B WITH YOUR ERP & OTHER MISSION-CRITICAL SYSTEMS

- ☐ Bi-directional sync between your B2B and ERP platforms

- ☐ Automatically feed in order changes and shipments from your back-end system

- ☐ Offer API integration

- ☐ Offer flat file / FTP integration

- ☐ Access to specialized integrations team

- ☐ Integrate with product catalog, product imagery and customer accounts

- ☐ Seamlessly integrate Inventory / ATS data

- ☐ Support for inventory from multiple warehouses

- ☐ Include flexible order output options

- ☐ Offer easy digital assets management (DAM) integrations provided out-of-box (OOB)

Marketing & Promotions

CUSTOMIZE THE B2B EXPERIENCE & COMMUNICATE BRAND IDENTITY

- ☐ Bi-directional sync between your B2B and ERP platforms

- ☐ Build brand portals with lookbooks, videos, and other photos/media with easy image hosting and uploading

- ☐ Integrate your social media feeds to keep buyers engaged with your brand's content

- ☐ Custom homepage design to mirror your B2C experience and drive customers to key catalogs or product groups

- ☐ Self-service asset library - allow customers to download hi-res imagery or media packs

- ☐ Present branded imagery, press and videos to promote marketing campaigns or runway content

- ☐ Create marketing assets with the collaborative Whiteboard tool

Reporting

GAIN REAL-TIME INSIGHT INTO YOUR BUSINESS PERFORMANCE

- ☐ Use easy, standard out-of-box reports or build and save advanced, custom reports to help with forecasting, product mix, and sales strategy
- ☐ View buyer activity, order history, customers who haven't ordered and seasonal comparisons
- ☐ Track sales rep performance monthly and by company

- ☐ See best sellers, most drafted styles, cancelled styles and inventory reports
- ☐ View daily order logs and YOY comparisons
- ☐ View on screen or export to Excel
- ☐ Receive automatic reports delivered daily/weekly via email

Mobile

ALLOW REPS & BUYERS TO SELL & BUY 24/7

- ☐ Provide full digital catalogs to reps and buyers via mobile
- ☐ Full ordering capabilities for reps and buyers via mobile
- ☐ Multi-device support, including iPad and iPhone

- ☐ Offer barcode scanning from scanner or in-device camera
- ☐ Offer optimized user experience on both mobile web and mobile app
- ☐ Support offline functionality that syncs immediately once connected

In-person Trade Shows & Market Seasons

CAPTURE NEW LEADS & GET MORE OUT OF YOUR MEETINGS

- ☐ Offer iPad and iPhone apps to bring your digital catalogs and linesheets on-the-go
- ☐ Use barcode scanning to help reduce appointment times, show more products and see more customers
- ☐ Offline capabilities for times when WiFi is not available
- ☐ Turn wishlists into draft orders to convert more appointments into sales and check out faster

- ☐ Prepare custom linesheets for each buyer in advance of their trade show appointment
- ☐ Digital note taking functionality to ensure easier follow-ups between buyers and reps
- ☐ Quick reporting tools to give your team visibility to what items are most popular at trade shows

Digital Trade Shows

PARTICIPATE IN THE WORLD'S TOP TRADE EVENTS ONLINE

- ☐ Sell via your virtual showroom during a live digital trade show event hosted by our international partners
- ☐ Create interactive digital "booth" pages that showcase your upcoming collection

- ☐ Book one-on-one virtual appointments with buyers
- ☐ Sell 24/7 throughout the duration of the show
- ☐ Connect with new buyers from around the globe

Partners

BENEFIT FROM OUR VALUED RELATIONSHIPS*

Exclusive Retail Partners:
Saks Fifth Avenue, Nordstrom, Net-a-Porter, Bllomingdale's, Grassroots Outdoor Alliance, Selfridges

Digital Trade Shows, Trade Organizations & Fashion Weeks:
MICAM Milano, MIPEL, Swim Show CFDA, New York FW, Milano FW, Copenhagen FW, Camera Nazionale della Moda Italiana

* Please check our website and calendar of events for our most up-to-date list of partners.

NuORDER by Lightspeed

Brand Onboarding & Support

GET UP & RUNNING TO START DELIVERING VALUE QUICKLY

- ☐ Dedicated onboarding team during setup process
- ☐ Dedicated Success Manager and Product Specialist to help you sell smarter
- ☐ 24/7 support provided by a global team
- ☐ Access to professional services offered by engagement managers and integration engineers
- ☐ Onsite trade show support

- ☐ Industry expert-led trainings and weekly webinars
- ☐ Online Knowledge Base that is constantly updated with the latest how-tos, self-guided tutorials, and best practices
- ☐ Personalized, onsite training platform
- ☐ Offer self-service maintenance and configuration
- ☐ In-app cues and other helpful navigation and use tips
- ☐ In-app Support Chat

Platform

EASILY MANAGE YOUR COMPANY DATA

- ☐ SaaS-based platform, no code or servers to manage, and with automatic updates
- ☐ New features and bug fixes added to the platform regularly
- ☐ Flexible user and role permissions to control which users can access features or perform specific functions within the platform
- ☐ Safeguard your brand with options including removing the ability to save full-size downloads of your images
- ☐ Automate refunds

- ☐ Authorize credit cards at the time of shipment only to avoid fees associated with excessive authorizations
- ☐ PCI compliant
- ☐ Visually appealing, user-friendly and intuitive user interface
- ☐ Easy to add new sales rep and buyer users
- ☐ Self-service product catalog additions and edits
- ☐ Export and download data
- ☐ Explore a retailer marketplace of over 500,000 stores

Knowing the right questions to ask while evaluating a B2B eCommerce platform is crucial to your success. Regardless of your industry, company size, or stage, a true B2B solution is more than bells and whistles—it should be an extension of your sales team with tools and technology designed to help you grow. As you evaluate the right vendor for your company, be sure to choose a solution that benefits both your brand and your buyers, integrates with your current technology, and complements the rest of your business.

Let NuORDER's experienced team identify the right B2B solution for your unique needs.

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