

B2B Order Management



Ecommerce has transformed the world of retail. Lured by the convenience of mobile shopping and promises of same-day delivery, more consumers purchase orders from ecommerce [marketplaces](#) over brick-and-mortar stores.

Now, [B2B](#) buyers want to get a piece of the action.

In 2021, B2B ecommerce grew [10.7%](#), reaching \$1.7 trillion in U.S. sales revenue, and was estimated to generate more than \$3 billion by 2027.

But B2B buyers don't just want access to buying goods online. From [multichannel](#) engagement to stress-free returns, B2B purchasers expect the same seamless experience as consumers. Some needs overlap, but B2B and B2C differ in order volume, conversion turnaround, delivery options and more.

Meeting diverse customer requirements with scattered tools and [software systems](#) can be challenging. The customer journey can involve as many as [39 applications](#), leaving your business vulnerable to mistakes and inconsistencies.

Accounting software, EDI, field reps, customer service agents, spreadsheets and ecommerce platforms. Does that sound familiar to you?

The good news is that you no longer have to work that way. With the proper order management system, you can streamline your order and fulfillment process, track inventory levels and shipments and add a personal touch that your customers will appreciate.

It's time to become a B2B company of the future. Here's how implementing an order management system will help you overcome common challenges that will save time and money, improve efficiency and buyer loyalty and give you and your customers an added level of transparency.

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Why Businesses Need B2B Order Management Systems

Happy customers spend money and reorder products. The demand from B2B companies is higher, and failure to meet expectations can be costly.

Without an efficient process, you may fail to deliver on your end of the promise. Multiple channels require a unified view of orders, customer information, inventory insights and performance reporting that's slick and effective.

Sales channels are hard to keep up with.

New online sales channels mean more opportunities to make money. However, it can come at a cost. Additional orders may increase workload and create delays and errors as you struggle to meet inventory and shipment demands from ecommerce, phone and in-person channels.

Inventory frequently runs out suddenly.

B2B customers take time to find the right products and vendors, so receiving an out-of-stock product notification after submitting an order is frustrating.

Without a system that provides inventory visibility, you risk stock and shipment discrepancies that can leave the shelves bare and result in delivery delays, particularly during peak sales. Implementing the right technology allows you to allocate and reserve inventory across sales channels without under or overselling products.

Data and information can be scattered and hard to manage.

During the early stages of business, it's common for teams to operate using disparate technologies and software to manage orders, often encompassing a B2B ecommerce platform, standalone order management software and an accounting tool.

However, this approach is insufficient for long-term business success as it creates data silos that produce false information. You need a holistic view of your information for real-time, accurate reporting that provides up-to-date financial, sales and customer forecasts.

Buyers find your current system difficult.

Your customers want hassle-free order updates and communication, answers to their questions and accurate shipment and delivery status. If your system makes accessing this information difficult or time-consuming, customers will seek a more straightforward process from your competition.

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Easy and efficient systems improve customer care, trust in your brand and lifetime value.

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Types of B2B Order Management Solutions

When evaluating order management solutions, consider what will work for your business size and industry to help your team move from confirmation to fulfillment.

Ultimately, you need a system that adapts to your strategy, improves workflows and scales your business.

Standalone order management software (OMS).

Standalone order management software is the most common solution for B2B companies. The reasonably priced option is often paired with [accounting and ecommerce platforms](#) and works well for small to mid-sized businesses.

This approach creates a viable purchasing strategy. It helps centralize sales and purchases across multiple channels, improving insight into stock availability and future inventory demands.

But a standalone OMS poses a challenge when attempting to coordinate and enter data across departments, so access to real-time information is limited. Integrating the solution with other technology — such as shipping, fulfillment and accounting tools — can cause disruption or compatibility issues.

Enterprise Resource Planning (ERP) software.

ERP software provides your business with integrated applications that comprehensively handle inventory order, financial, payroll, human resources, CRM, warehouse, customer management and logistics. It creates a consistent process for overseeing operations, team members, customers and vendors.

But the software can be costly and isn't the best option for a smaller business. It can't be customized to meet your specific business or industry needs, wherein you may pay for unnecessary features and functionality.

ERP software also has a steep learning curve which may require substantial time and resources to implement and integrate the system.

Retail and B2B operations platforms.

This solution combines ERP software's functionality with a standalone OMS's intuitiveness. Designed for the specialized demands of the B2B retail and wholesale industry, you can import

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and export products, manage orders, sell, ship, track orders and inventory and manage marketing strategies, customer care and information storage.

The solution meets industry best practices and provides a unified, automated buying experience.

With less functionality of traditional ERP software, such as human resource and payroll features, the system takes one-third of the time to launch.

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How B2B Order Management Works

The B2B order management process involves everything after your customer completes checkout, encompassing fulfillment, packaging and shipping. How you approach each step in the process, from confirmation to completion, can make or break a customer experience.

The overall process generally consists of the following steps:

Order confirmation.

When a customer orders over the phone or online, the information is collected manually or automatically. The customer receives an email, text message or paper receipt confirmation.

Order management list.

Your customer's information is input into a list for follow-up communication regarding shipping or marketing retargeting.

Production/packaging.

The distribution center reserves and assigns products for order allocation using manual processing or automation. The purchase goes to the warehouse for pickup, packaging and shipment.

A backorder is created for out-of-stock items and the inventory data is updated to indicate the change in product availability. When an item is out of stock, be sure to communicate that to the customer immediately.

Shipment notification.

Customers are notified that their package has shipped and is en route to the designated address. The communication is honest and straightforward to temper customer expectations.

Order fulfillment.

The order is delivered and received by the customer efficiently and promptly.

The process will mirror the above steps in reverse order for returns, exchanges and refunds. The customer receives confirmation of order tracking and receipt of returned goods and credits. Provide self-service order status, shipping and returns when possible.

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Key Ways B2B Order Management Can Boost Online Stores

Efficient order management can transform common challenges into profitable opportunities. For businesses that complete more than 100 orders daily, a seamless operation will help you customize and automate your process and avoid potential crises.

Manage orders over all sales platforms.

Accept orders at every touchpoint, including site locations, facilities and digital channels and process information in one place. Whether you opt for a multichannel or omnichannel workflow, you can save your team members time.

Instead of your sales reps running from channel to channel to create orders, update items and payments and assess inventory management, they can capture information from every platform.

Go paperless.

A B2B order management software reduces paper usage, ink, printer and equipment maintenance costs. A cloud-based platform provides the tools to communicate via email or other online channels and access consolidated digital data for better process flow.

The eco-conscious solution will also appeal to your environmentally-driven customers.

Centralize data across multiple channels.

Multiple channels shouldn't result in varied data. No matter where and when customers complete their orders, a management system will combine all data entries in a central location, giving your customer sales team access to the most accurate information.

With insights into inventory fluctuation, accounting and warehouse management, your sales reps have the power to provide personalized customer service.

You can also leverage information for lead generation and marketing strategies.

Reduce supply chain complexity.

The right system will ensure customers have the accurate status of inventory levels and order transit, location, expected time of arrival and details about any delays.

You can share insights into every stage of your supply chain — warehouse, store locations, third-party logistics (3PL) providers and fulfillment centers.

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The less time your team members spend scouring data sources, calming customer complaints and putting out fires that arise from poor inventory visibility, are hours they can invest in other areas of the business.

Track orders and keep customers happy.

Sometimes customers change their minds, and orders or invoices must be updated quickly. With streamlined technology, you can make amendments no matter where the order is in the order management process.

B2B customers may also become insecure if they don't receive timely updates. Transparent order status update eases customer uncertainties.

It will save your operations the headache of a costly miss-shipment.

Furthermore, customers can better plan their sales process and strategize goals.

Meet purchasers' high standards through customization.

B2B customers spend significant money with your company and want to feel valued. They desire a customized experience that meets their specific requirements.

Custom delivery and billing communication build trust and let customers know they aren't just one of many.

Get orders out the door faster.

Integrated order shipping and management equips team members to share data quickly and ship orders fast. Automating each step of your order management process with real-time data — order fulfillment, inventory insights and shipment updates — gets your orders in your customer's hands faster and strengthens customer satisfaction.

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B2B Order Management System Concerns to Monitor

As technology advances, the importance of B2B ecommerce continues to become a significant channel for business. Still, some challenges can make processing orders and meeting customer expectations difficult.

Be mindful and continuously monitor these concerns throughout your order management cycle. They may not be an issue now, but they could harm future business.

EDI requirements can be challenging.

The beauty of Electronic Data Interchange or EDI is that you can exchange documents and transactions, such as purchase orders, invoices and delivery confirmations between trading partners in a fast, secure standard electronic format.

It's a convenient, paperless option that supports synchronized communication and removes the need for manual information exchange such as paper or faxes. But a standard format isn't enough for larger or more established businesses.

They want a format compatible with their internal systems, requiring less money, time and resources to process orders.

Global supply chains are complex and growing.

The B2B buying cycle is more intricate than B2C retail. There isn't one way to fulfill and complete global shipments. Your business may opt for the traditional in-house supply chain process, third-party logistics (3PL) providers or dropshipping.

A dropshipping fulfillment service receives orders and shipments upon requests from a vendor or manufacturer. They act as silent partners, managing orders and shipping and delivering items using your branding, unbeknownst to the customer.

With a 3PL, a logistics provider receives regular inventory cargo and handles the shipping, returns, freight forwarding and order processing.

Each method alleviates your team of some of the order processing responsibilities but also accompanies a unique set of challenges that can hinder successful fulfillment.

Using order management, you can efficiently route items throughout the entire flow of your supply chain.

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Multichannel selling along with a growing demand for online shopping.

Simultaneously fulfilling orders online and across channels can cause stock deficiencies, inventory misrepresentation and delivery delays in a siloed system. It may also exhaust your team's ability and resources to meet rising demand, resulting in missed leads and strained customer relationships.

This challenge is particularly concerning for hybrid retail and B2B businesses that process online orders for diverse customer personas. From occasional, large orders from B2B customers with longer buying cycles and small, recurring purchases for B2C consumers with shorter lead times.

Not having an efficient system can hinder your ability to provide timely product deliveries that meet the satisfaction of your customers and distributors.

Purchasers have high standards.

B2B customers purchase recurring, expensive bulk orders. There's added value for your business, and the customer wants more for their money. They have higher product quality expectations, know what they want and aren't likely to be forgiving of mistakes. A poor first impression could damage weeks of lead nurturing.

While B2B customers want the same frictionless site navigation, speedy checkout experience, fast shipping options and informed customer service as B2C customers.

They may also need face-to-face sales meetings, tailored pricing, customized services and simple order processing. Failure to meet these dual demands can result in order returns, chargebacks and canceled contract agreements that negatively impact your bottom line.

Business needs differ from consumer needs.

Your B2B customers may have the same level of expectations, but they have different needs. You may not be able to accommodate every requirement. But be prepared to support any combination of attractive pricing, bulk orders and discounts, back orders and pre-orders, diverse payment and delivery options, in-person, online and field orders, self-service features and transparent communication updates.

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The Final Word

Manual processing will only get you so far, often leading to deficiencies as your business scales. An order management system unifies all sales channels with a customer-facing system that delivers value and equips team members with access to a centralized platform.

An efficient system empowers agents with reliable data on the front end to manage and edit existing sales orders in only a few clicks. Merging your front-end marketing, conversion and customer acquisition with backend logistical management improves process flow, reduces errors and saves money.

Mix in the ability to share order numbers, confirmation, inventory updates and shipment notifications and you'll be no match for the competition.

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FAQs About B2B Order Management

How is B2B ecommerce order management different from B2C?

B2B orders are larger and more expensive than the average consumer order. The buying cycle is extensive and may involve EDIs and RFPs, which increase complexity and the chance for errors detrimental to customer relationships. The common goal for both B2C and B2B order management is to reduce the legwork and resources needed to move goods from point A to B.

Can B2B2C use order management?

B2B2C companies can use order management to streamline sales from all platforms, including inventory availability across channels, tracking orders and providing detailed delivery updates for your locations and third-party logistics (3PL) providers.

Do B2B order management tools help process orders more quickly?

B2B order management tools remove the need for manual processing and fulfillment, automating your flow to complete orders faster and more efficiently.

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