



## CAPABILITY OVERVIEW

# SALESFORCE B2B COMMERCE

Salesforce B2B Commerce is a robust B2B commerce technology built on the world's #1 CRM. With Salesforce B2B Commerce, businesses generate more online revenue, deliver streamlined service with a single view of their customers, and scale quickly with a broad, trusted ecosystem.

B2B Commerce is feature-rich, and we continue to innovate with three releases a year.

OOTB via  
Configuration

Extensible

### ACCOUNT MANAGEMENT

|                                    |  |   |   |
|------------------------------------|--|---|---|
| <b>Login</b>                       | Ability to provide login page and authentication to access the store   | ✓ | ✓ |
| <b>Address Management</b>          | Multiple sold-to and ship-to addresses at the account level  | ✓ | ✓ |
|                                    | Ad hoc addresses that can be added during checkout   | ✗ | ✓ |
| <b>Order History &amp; Details</b> | Listing of previous orders and order information, with the ability to take actions against those orders  | ✓ | ✓ |
|                                    | Configurable fields and columns to control data displayed in history and details   | ✓ | ✓ |
| <b>Invoice Management</b>          | View, pay, and dispute invoices, including ability to pay multiple invoices simultaneously, perform partial payment of invoices, and have summary invoices | ✗ | ✓ |



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**ACCOUNT MANAGEMENT** *(continued)*

|                           |   |   |   |
|---------------------------|---|---|---|
| <b>My Account</b>         | Manage account and contact information  | ✓ | ✓ |
|                           | Unified profile experience and account across self-service, including knowledge, commerce, support  | ✓ | ✓ |
| <b>Multiple Carts</b>     | Support for buyers who may need to maintain multiple carts to handle different ship tos/effective accounts  | ✓ | ✓ |
| <b>Effective Accounts</b> | A single user can order for multiple accounts. Typically this is a scenario where a buyer is responsible for multiple outlets, or purchases for multiple ship-to locations. | ✓ | ✓ |
| <b>Account Hierarchy</b>  | Maintain and respect buyer account hierarchy structure to manage sold-to, bill-to, and ship-to structure  | ✓ | ✓ |

**ANALYTICS**

|                         |  |   |   |
|-------------------------|--|---|---|
| <b>Reporting</b>        | Reporting to understand contact, account, order, product, or business-level trends and data related to the commerce experience                                 | ✓ | ✓ |
|                         | Dashboards to provide quick visibility into store/commerce health and success  | ✓ | ✓ |
| <b>Google Analytics</b> | Page flow tracking to understand the pages that a browser has visited, and where they are dropping off. Google Tag Manager support, aka third-party scripting. | ✓ | ✓ |

**ARCHITECTURE**

|                   |     |   |   |
|-------------------|-----|---|---|
| <b>Compliance</b> | PCI | ✓ | ✗ |
|                   | ADA | ✗ | ✓ |



## CART & ORDER MANAGEMENT

|   |  |   |   |
|---|--|---|---|
| <b>Quick Order</b>                        | Auto-complete, quick entry of SKUs by reps and informed end customers, enforcing validation of entitlements  | ✓ | ✓ |
|   | 1. Advanced quick order experience allowing for complex searching of products by multiple attributes   | ✗ | ✓ |
|   | 2. Advanced display experience showing product information beyond the SKU and name   |   |   |
| <b>Wish Lists/Order Templates</b>         | Buyers can create multiple wish lists for orders and reorders to represent restocks, favorites, or saved items to revisit. Includes the ability to quickly add multiple items to cart at once. | ✓ | ✓ |
| <b>Validations &amp; Rules</b>            | Incorporate specific rules around validating that a cart/order meets the requirements of the business processes and completeness to push to the back office                                    | ✗ | ✓ |
|   | Ability to define quantity rules around allowed quantities that can be entered for a product and have the experience enforce/honor that for quick order, add-to cart                           | ✗ | ✓ |
| <b>Checkout Experience</b>                | Ability to configure checkout flow steps to easily conform the business-specific order capture needs   | ✓ | ✓ |
|   | Ability to plug in customer-specific integrations throughout the checkout process  | ✓ | ✓ |
| <b>Shipping &amp; Delivery Management</b> | Provide shipping preferences at order level for instructions, requested date   | ✗ | ✓ |
|   | Shipping tables to manage charges based on weight and location   | ✗ | ✓ |
|   | Integrate third-party shipping driven from a provider such as FedEx, or from a customer's internal logistics system  | ✓ | ✓ |



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**CART & ORDER MANAGEMENT** *(continued)*

|   |  |   |   |
|---|--|---|---|
| <b>Billing &amp; Payment</b>                        | Provide support to choose from multiple payment methods for payment. Includes providing PO payment as well as support for plugging in other methods.                       | ✓ | ✓ |
| <b>Tax</b>  | Manual tax tables to specify taxes based on city, state/province, zip  | ✗ | ✓ |
|   | Integrate third-party tax service from a provider such as Vertex, or from a customer's internal back office or financials system   | ✓ | ✓ |
|   | Showcase international tax breakdowns in cart and checkout to see GST, PST, VAT, etc.  | ✗ | ✓ |
| <b>Order Change &amp; Updates, including status</b> | View and change order and order line items and cancellations. Update status on line items.   | ✗ | ✓ |
| <b>Seller Locator</b>                               | Find a seller nearest to particular address or location, and view on a map   | ✗ | ✓ |
| <b>Marketplace</b>                                  | Unified marketplace allowing multiple different sellers to offer products in a noncompetitive or overlapping fashion, where each supplier offers unique/different products | ✗ | ✓ |
|   | Manufacturer- /brand-managed marketplaces where they manage the products, and the sellers/distributors manage just pricing and inventory                                   | ✗ | ✓ |
| <b>Quoting</b>                                      | Ability to quote an individual product that either is not eligible for purchase or for customers wanting to negotiate pricing for it                                       | ✗ | ✓ |
|   | Request for quote of a cart of items to kick off a price negotiation process   | ✗ | ✓ |



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## CATALOG MANAGEMENT

|                                     |   |   |   |
|-------------------------------------|---|---|---|
| <b>Web Categorization</b>           | Ability to define a product catalog containing a hierarchy of categories and products by store  | ✓ | ✓ |
| <b>PIM/PLM</b>                      | Centralized workspace to manage product information, including media, categorization, custom fields, and definition of products, along with assignment to categories and entitlements   | ✓ | ✓ |
| <b>Product Inventory Management</b> | Inventory management at a product level to manually keep track of current levels at a DC or location level  | ✗ | ✓ |
|                                     | Inventory tracking to automatically update inventory based on placed orders or via ATP  | ✗ | ✓ |
|                                     | Filter products in search and browse to prevent add-to cart based on inventory levels   | ✗ | ✓ |
| <b>Attributes</b>                   | Ability to define fields to hold custom information related to a product  | ✓ | ✓ |
|                                     | Ability to associate files, videos, and media to a product  | ✓ | ✓ |
| <b>Bundles</b>                      | Define marketing or selling bundles of products to sell a group of items together, either to accommodate a bundled pricing discount, or to ensure that all items are purchased together | ✗ | ✓ |



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## MERCHANDISING

|  |  |   |   |
|--|--|---|---|
| <b>Offer Targeting &amp; Merchandising</b> | Digital merchandising content targeted at buying groups and accounts to drive purchasing and inform on offers                      | ✗ | ✓ |
|  | Ability to feature and spotlight products on the landing page to drive purchasing and product awareness.                           | ✗ | ✓ |
| <b>Category Landing Pages</b>              | Tailored landing pages for categories allow customers to showcase category-specific images, and product listings                   | ✓ | ✓ |
| <b>Search (filtering, auto-complete)</b>   | Commerce search capabilities to search against product-related data, support guided filtering, and faceting to narrow results      | ✓ | ✗ |
| <b>Search (configurations)</b>             | Advanced search management, including custom fields, rollup of products within a category tree, and ranking                        | ✓ | ✗ |
| <b>Product Compare</b>                     | Compare attributes, information between multiple products in the catalog   | ✗ | ✓ |
| <b>Product Relationships</b>               | Define product relationships to manage upsells, cross-sells, accessories, and so on, and showcase those relationships in the store | ✗ | ✓ |
| <b>Rule-Based Recommendations</b>          | Leverage rules, logic, and strategies to drive recommendations   | ✗ | ✓ |
| <b>Intelligent Recommendations</b>         | Leverage Einstein/AI to discern insights based on data to drive recommendations  | ✗ | ✓ |



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## PRICING & ENTITLEMENTS

|                                       |  |   |   |
|---------------------------------------|--|---|---|
| <b>Customer-Specific Pricing</b>      | Pricing specific to a buyer segment or account to reflect negotiated pricing between the buyer and seller, including pricing based on lowest price versus priority | ✓ | ✓ |
| <b>Customer-Specific Entitlements</b> | Entitlements that drive product visibility in the store to control the products a buyer segment or account can see   | ✓ | ✗ |
| <b>Multicurrency</b>                  | Support multiple currencies for a product to be sold in, within a single store or across multiple stores   | ✓ | ✓ |
| <b>Tiered Pricing</b>                 | Volume-based discount pricing to incentivize buying in bulk  | ✓ | ✗ |
| <b>Subscriptions</b>                  | Ability to sell a physical good on a recurring basis to automatically have it reorder and bill on a fixed period of time   | ✗ | ✓ |



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## USER EXPERIENCE

|  |   |   |   |
|--|---|---|---|
| <b>Multi-Storefronts &amp; Micro-Storefronts</b> | Support for multibranded storefront experiences, and personalized branding  | ✓ | ✓ |
| <b>Site/Storefront Administration</b>            | Administration console for catalog, merchandising, setup, and content management  | ✓ | ✓ |
| <b>Multilingual</b>                              | Support multiple languages for a store to be presented in, within a single store or across multiple stores                      | ✓ | ✓ |
| <b>Drag-and-Drop Experience building</b>         | Easy administration tools for business users to build and preview visual experiences on the site                                | ✓ | ✓ |
| <b>Content Management</b>                        | Creation and targeting of content to weave into the commerce experience   | ✓ | ✓ |
| <b>Mobile</b>                                    | Responsive experience providing full commerce experience and capabilities regardless of the form factor                         | ✓ | ✓ |
|  | Hybrid mobile app generation allowing for creation of downloadable mobile applications  | ✓ | ✓ |
| <b>Notifications</b>                             | Trigger automated email, text, and bell notifications for events such as a confirmed order, abandoned cart, and order reminders | ✓ | ✓ |

