



Creating a B2B affiliate portal for retail e-commerce

CASE STUDY

Industry: Publishing

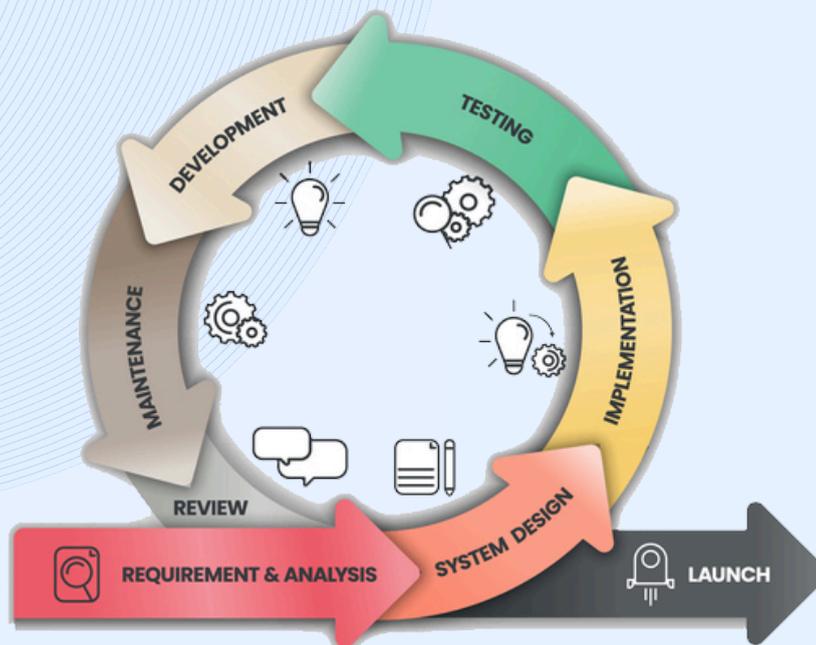
Client: Confidential

Year: 2024

In 2024, OPTI undertook the challenge of implementing a B2B affiliate portal for a retail e-commerce company.

The primary goal was to enhance the user experience for business clients while simultaneously increasing sales volume and providing support for traditional individual customers.

The new portal needed to integrate various promotional activities, manage different user groups, and streamline account management to cater to both business and regular customers.





CHALLENGES

The project presented several obstacles such as:

-  **The platform was to offer personalized promotions** that resonated with both business clients and traditional customers.
-  **A dedicated account management system was needed** to meet the specific needs of business clients.
-  **The solution required a communication module** for managing notifications and marketing materials.
-  **The portal needed to provide access to account management functionalities**, such as order history, invoices, and logistics management.
-  **There was a need to implement a monitoring and analytics system** to track the performance of the new portal and make data-driven decisions.



SOLUTION

The B2B e-commerce solution focused on enhancing the user experience and increasing conversions among business clients.

1. PERSONALIZATION OF PROMOTIONS

- ✓ **The portal provides relevant personalized promotions** based on client type.
- ✓ **Special voucher campaigns to reward loyalty** among returning clients and newsletter subscribers.
- ✓ **Discounts and promotions are customized** based on client order metrics and their respective categories.

2. BUSINESS CLIENT ACCOUNT MANAGEMENT

- ✓ **A KYC (Know Your Customer) verification process is implemented** to verify the legitimacy of business clients.
- ✓ **Upon login, business clients have immediate access to personalized pricing**, improving their shopping experience and increasing the likelihood of conversion.

3. COMMUNICATION AND ORDER MANAGEMENT

- ✓ **The platform includes a communication module** for notifications related to account and marketing materials.
- ✓ **Clients can add specific notes to their orders**, improving the accuracy and efficiency of the delivery process.
- ✓ **The solution offers flexible payment options** tailored to the needs of business clients who wished to purchase large volumes of products.

4. TRANSPARENCY AND ACCESSIBILITY

- ✓ **The portal allows business clients to manage multiple entities** under a single account.
- ✓ Clients can access **detailed order and invoice histories**.
- ✓ **The solution supports multiple shipping addresses and pickup points**, catering to logistical needs of businesses.
- ✓ **The platform includes features** such as gift cards, returns, and subscriptions, enhancing the customer experience.

5. MONITORING AND ANALYTICS

- ✓ **The system implemented distinct analysis capabilities** for B2B sales sources, providing insights into the performance of the affiliate portal.
- ✓ **The solution offers detailed reporting options**, allowing for filtering and analysis of sales data to inform decision-making and strategy development.



RESULTS

The B2B affiliate portal went live in mid 2024, delivering significant improvements in business customer engagement and driving growth in the B2B segment. Key outcomes included:



Increased sales volume

The tailored offers and efficient account management led to a noticeable increase in sales from business clients.



Enhanced user experience

Business clients reported a better and personalized shopping experience, contributing to higher satisfaction and repeat business.



Improved operational efficiency

The advanced communication and order management features streamlined operations, reducing the time and effort required to manage large orders and client communications.



Data-driven decision making

The implementation of B2B-specific tracking and advanced reporting provided the client with valuable insights, enabling them to make informed decisions.

TECHNOLOGIES



Frontend: UI and UX (Figma, Bootstrap), Material design



Backend: PHP, MySQL, Sphinx Search, Elasticsearch



TESTIMONIAL

"Working with OPTI has been an absolute pleasure from the start! They are very quick to respond and complete projects, and have been a joy to work with. We highly recommend OPTI!"

- Ethan Harris, Spatz Medical

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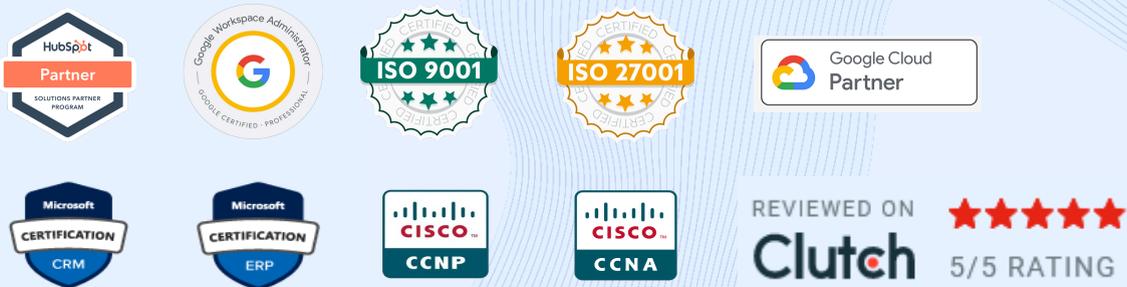
OPTI

PRODUCT DEVELOPMENT, AUTOMATION AND DATA MIGRATION

Software company developing products and cutting costs by automations and data migrations. Founded in 2005, with extensive expertise in retail, medical, publishing, and gaming industries.

The OPTI team includes senior analysts and programmers, is ISO 9001 and ISO 27001 certified, HubSpot Solution Partner, Google Cloud Partner and certified in other technological stacks.

CERTIFICATIONS



KNOW-HOW

