



ENHANCING B2B E-COMMERCE WITH SALESFORCE ORDER MANAGEMENT:  
A STRATEGIC APPROACH

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*Abstract*

*The transformative influence of Order Management Systems on B2B e-commerce operations is increasingly evident as businesses strive to meet the demands of a digital economy. This paper presents an in-depth analysis of Salesforce OMS implementation within B2B commerce environments, highlighting its role in optimizing order lifecycle management, enhancing customer experience, and effectively integrating with existing technological ecosystems. We explore how Salesforce OMS addresses the unique complexities of B2B transactions by enabling real-time inventory management, supporting multi-channel sales strategies, and providing robust analytics for strategic insights. The study further discusses the system's impact on global supply chain operations, including multi-currency and multi-language capabilities essential for international businesses. By analyzing the strategic considerations and potential outcomes of Salesforce OMS deployment, we describe the critical factors contributing to successful implementation and the resulting operational benefits. The insights from this research underscore Salesforce OMS as a potent tool for B2B enterprises looking to elevate their e-commerce strategies in pursuit of streamlined processes, improved customer loyalty, and accelerated business growth.*

*Keywords— Salesforce OMS, Order Management Lifecycle, E-Commerce Integration, B2B Order Processing, Centralized Order Management, Customer 360 Platform, Real-Time Inventory, Order Automation, Personalized Customer Experience, Omni-Channel Strategy, Customer Relationship Management*

## I. INTRODUCTION

Salesforce Order Management System is an integrated order management platform that enables companies engaged in e-commerce and B2B operations to manage their order lifecycle from placement to fulfillment and onwards through customer service interactions. The introduction of Salesforce OMS has been significant as it builds on the Salesforce Customer 360 Platform. It gives businesses a holistic view of the customer's journey, allowing them to deliver personalized experiences. By leveraging the power of the cloud and the Salesforce ecosystem, OMS serves as a bridge between sales, finance, and customer support teams, ensuring that they work together seamlessly to drive business outcomes.



The key features of Salesforce OMS include:

- Centralized order management.
- Real-time inventory tracking.
- Automation of routine tasks.
- The facilitation of multi-channel selling.

Salesforce OMS is designed to be flexible and scalable and can be customized to suit various business models, whether they are focused on direct-to-consumer sales, working with distribution partners, or engaged in complex B2B transactions with longer sales cycles and bulk ordering.

By offering a single source of truth for order data, Salesforce OMS helps businesses reduce errors, improve order accuracy, and provide excellent customer service. Advanced analytics and reporting capabilities within Salesforce OMS offer insights into operational effectiveness and customer behavior, thus supporting strategic decision-making.

The Salesforce OMS is not just a tool for managing transactions; it's a strategic asset that supports growth, operational efficiency, and customer satisfaction in an increasingly competitive and complex e-commerce and B2B landscape. [1][2]

## II. WHY SALESFORCE ORDER MANAGEMENT SYSTEM?

Salesforce Order Management System can be a strategic choice for businesses due to several reasons:

- **Integration with Salesforce Ecosystem:** Salesforce OMS is built on the Salesforce Customer 360 Platform, which allows seamless integration with other Salesforce products and provides a unified view of the customer across sales, customer service, marketing, and more.
- **Enhanced Customer Experience:** With its holistic view of the customer journey, Salesforce OMS enables personalized engagement and can help improve customer service interactions, leading to higher satisfaction rates.
- **Streamlined Operations:** It automates key order management processes and centralizes data, which helps reduce errors, increase order accuracy, and speed up the fulfillment cycle.
- **Scalability and Customization:** Salesforce OMS is designed to be flexible and scalable to fit different business models and growth patterns, allowing it to be customized for direct-to-consumer, B2B, or any other sales strategy.
- **Real-Time Data and Analytics:** Offering real-time inventory and order tracking, as well as advanced analytics, assists in making informed strategic decisions and understanding customer behavior.
- **Multi-Channel Capability:** It supports the management of orders from various sales channels, facilitating an accurate omni-channel approach and ensuring consistent customer experiences.



- **Cloud-Based Solution:** As a cloud-based platform, Salesforce OMS can provide accessibility from anywhere, reduce the need for extensive IT infrastructure, and offer robust security features.
- **Operational Efficiency:** Automation and real-time visibility into order and inventory management help optimize stock levels, reduce wasted resources, and cut costs.

In summary, Salesforce OMS helps businesses adapt to changing e-commerce and B2B landscapes, improve efficiency, foster customer loyalty, and drive growth.

### III. ORDER MANAGEMENT LIFECYCLE STAGES: THE JOURNEY OF AN ORDER

The journey of each order in Order Management is defined by a series of stages that together form the order lifecycle.

Order management involves moving an order through various stages.

- **Order Placement:** The beginning of the lifecycle where customers select products and place their orders through the available channels.
- **Order Processing:** During this stage, the order is validated, payment is authorized, and the order details are verified for accuracy.
- **Order Fulfillment:** This includes allocating inventory for the order, picking and packing the items, and arranging for their shipment to reach the customer.
- **Shipping and Delivery:** The products are sent to the customer with tracking information to allow both the customer and the business to monitor the delivery's progress.
- **After-sales Support:** Post-delivery activities that encompass customer service, which includes handling returns, exchanges, and any post-purchase issues.
- **Returns and Refunds Management:** This stage involves managing the returns process if the customer isn't satisfied with the product and processing the necessary refunds or exchanges.
- **Analytics and Reporting:** The final stage in the lifecycle, where data collected throughout the process is analyzed to improve future performance and customer satisfaction. Each stage is a critical part of the order management process and contributes to the overall efficiency and effectiveness of a company's order fulfillment system.

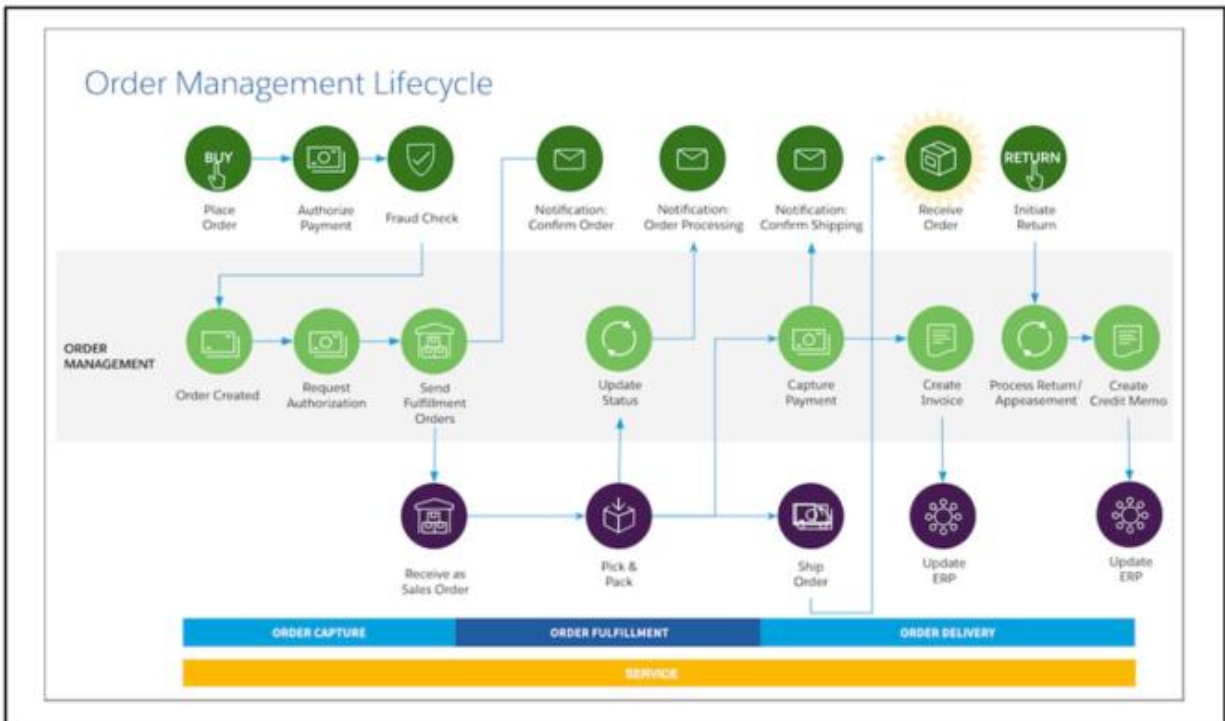


Fig 1 Order Management Lifecycle [2]

#### IV. THE TRANSFORMATIVE EFFECT OF SALESFORCE OMS ON B2B OPERATIONS

The impact of Salesforce OMS on B2B operations is multifaceted, with improvements observed in several areas:

- **Streamlined Order Processing:** B2B operations often involve complex workflows and large orders. Salesforce OMS can streamline these processes, making handling bulk orders, managing approvals, and processing payments easier.
- **Enhanced Customer Relations:** Through a unified view of customer interactions, businesses can use Salesforce OMS to improve customer relations by personalizing experiences and ensuring consistency across all touchpoints.
- **Efficient Inventory Management:** Salesforce OMS provides real-time visibility into inventory levels, significantly reducing the risk of stockouts or excess inventory. This is critical for B2B transactions, where higher volumes and stock management are essential.
- **Better Fulfillment Strategies:** Salesforce OMS's integration capabilities allow B2B operations to coordinate better with fulfillment partners, improving the efficiency of the supply chain.



- **Data-Driven Decision Making:** The system's analytics tools help B2B businesses make informed decisions about inventory, sales forecasting, and customer demand, which can lead to better resource management and strategic planning.
- **Increased Operational Transparency:** By tracking the order lifecycle, B2B clients receive greater visibility into order status, which enhances trust and service satisfaction.
- **Agility and Scalability:** Salesforce OMS enables B2B operations to be more agile, responding quickly to market changes or customer needs and to scale operations up or down as needed without significant infrastructure changes.
- **Automation of Manual Processes:** Automating manual processes increases efficiency and allows B2B businesses to reallocate resources to strategic growth areas.
- **Global Commerce Support:** For B2B operations with a global reach, Salesforce OMS can accommodate different languages, currencies, tax policies, and compliance requirements.
- **Accelerated Digital Transformation:** In integrating Salesforce OMS, B2B companies may accelerate their digital transformation initiatives, becoming more aligned with modern business practices and customer expectations.

Overall, Salesforce OMS's impact on B2B operations can lead to enhanced customer satisfaction, operational efficiencies, and a platform for growth that is adaptive to the rapidly changing landscape of global business.

## V. BENEFITS OF BEING IN SALESFORCE PLATFORM

The advantages of being part of the Salesforce ecosystem are manifold. Notably, Salesforce Order Management comes pre-connected to Salesforce Commerce Cloud, catering to various business models such as B2C, B2B, and D2C. This integration works seamlessly with Salesforce CRM, ensuring a comprehensive data record by operating on the same physical platform and sharing a standard data model.

Another standout feature of Salesforce Order Management is its native support for Service Cloud. This provides a unified view of customer orders and transaction history, a crucial aspect for businesses aiming to enhance customer experiences. Furthermore, its flexibility to integrate with external systems significantly improves both pre-purchase and post-purchase experiences for customers.[3]

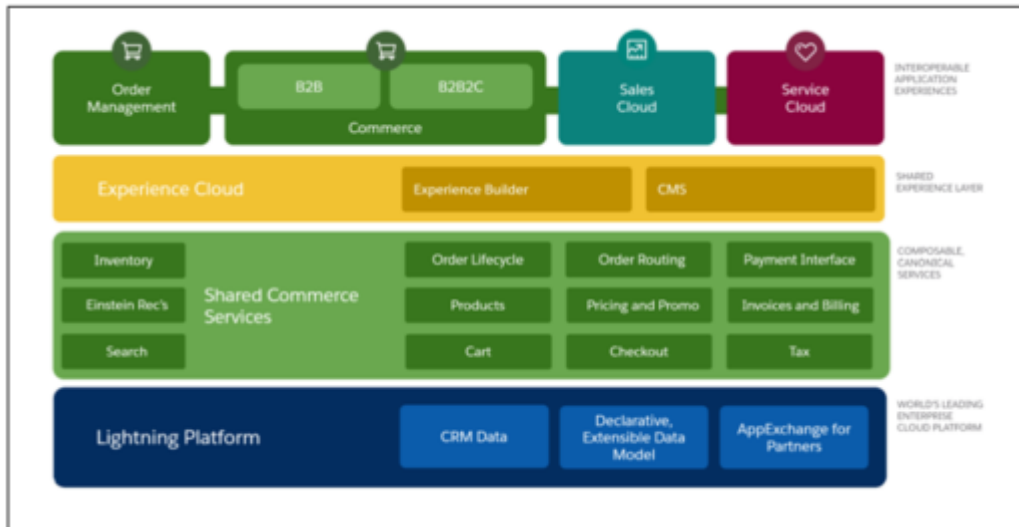


Fig 2 Salesforce Order Management & Lightning Platform [3]

## VI. SALESFORCE ORDER MANAGEMENT CAPABILITIES

Salesforce Order Management's capabilities are rapidly expanding with each update release. As you read this, you may notice that Salesforce has already covered more features. Some of the capabilities of Salesforce Order Management include:[3][4]

- **Order lifecycle** - Experience efficient order management and multi-channel support across commerce, marketplace, and POS.
- **Payment processing** - Supports Authentication, capturing and refunding, invoicing and issuing credit memos.
- **Order servicing** - It includes order cancellation, reshipping, discounts, returns, return merchandise authorizations (RMA), exchanges, and more.
- **Order fulfillment** - Supports essential fulfillment, distributed order management (DOM), and location-specific inventory through Omni-Channel Inventory Process (OCI).
- **Taxation** -Order Management supports both sales tax and value-added tax (VAT).
- **Exception management** - Order Management creates a process exception record and generates a notification when an issue interrupts normal processing.
- **Prebuilt reports** - The Order Management Reports package includes a prebuilt reporting dashboard, which encompasses Credit Memo, Invoice, Fulfillment Order, Order Payment Summary, Order Summary, and Return Order.
- **Prebuilt flows** - It comes with pre-built flows supporting fulfillment, cancellation, payment, cancel & return, RMA, and many more.



## VII. KEY CONSIDERATIONS FOR CHOOSING AN ORDER MANAGEMENT SYSTEM (OMS) FOR YOUR BUSINESS

When selecting an Order Management System for your business, consider the following factors:  
Business Compatibility: Choose an OMS that aligns with your business model (B2B, B2C, or a mix) and can handle your specific operational complexities.

- **Integration:** The OMS should integrate smoothly with your IT infrastructure, including ERP systems, e-commerce platforms, CRM software, and supply chain management tools.
- **Scalability:** The system must grow with your business, supporting increased orders and expanding operational requirements without performance issues.
- **Customization:** Look for an OMS customizable to your business processes and offers flexibility in order management, workflow automation, and user roles.
- **Ease of Use:** The system should have an intuitive interface for all users, from order entry personnel to management, and require minimal training to operate efficiently.
- **Multi-Channel Support:** Ensure the OMS can manage orders from all your sales channels, facilitating an omnichannel approach.
- **Inventory Management:** Effective OMS should provide real-time inventory tracking across multiple locations, helping prevent stock outs and excess inventory.
- **Order Tracking and Visibility:** Both your team and your customers should be able to track orders throughout the fulfillment process for transparency and improved service.
- **Customer Experience:** A suitable OMS will help you enhance your customer experience through fast, accurate order processing and personalized service options.
- **Analytics and Reporting:** Access to detail reporting and analytics is critical for strategic planning, performance monitoring, and continuous improvement efforts.
- **Vendor Ecosystem:** Consider the ecosystem of partners and integrators for the OMS, which can extend the system's capabilities and provide implementation support.
- **Global Operations Support:** If you operate globally, the system should support international shipping, multiple currencies, tax regimes, and multilingual interfaces.
- **Cost Considerations:** Consider the total cost of ownership, including software licenses, implementation, customization, training, support, and upgrades.
- **Support and Maintenance:** Good vendor support and an active user community can be crucial for problem-solving and knowledge-sharing.
- **Security and Compliance:** The OMS must ensure data security and help your business comply with regulatory requirements such as GDPR, PCI DSS, or industry-specific standards.

## VIII. KEY BENEFITS TO BUSINESS WITH OMS

Businesses often report a variety of benefits with OMS, including but not limited to:



- Streamlined order-to-cash processes.
- Improved visibility of order status and inventory.
- Implemented process automation to reduce operational costs.
- Enhanced customer satisfaction and increased customer retention.
- Increased sales resulting from improved cross-selling and upselling strategies.
- Improving the management of global operations to increase efficiency.
- Improved data management and enhanced reporting capabilities.

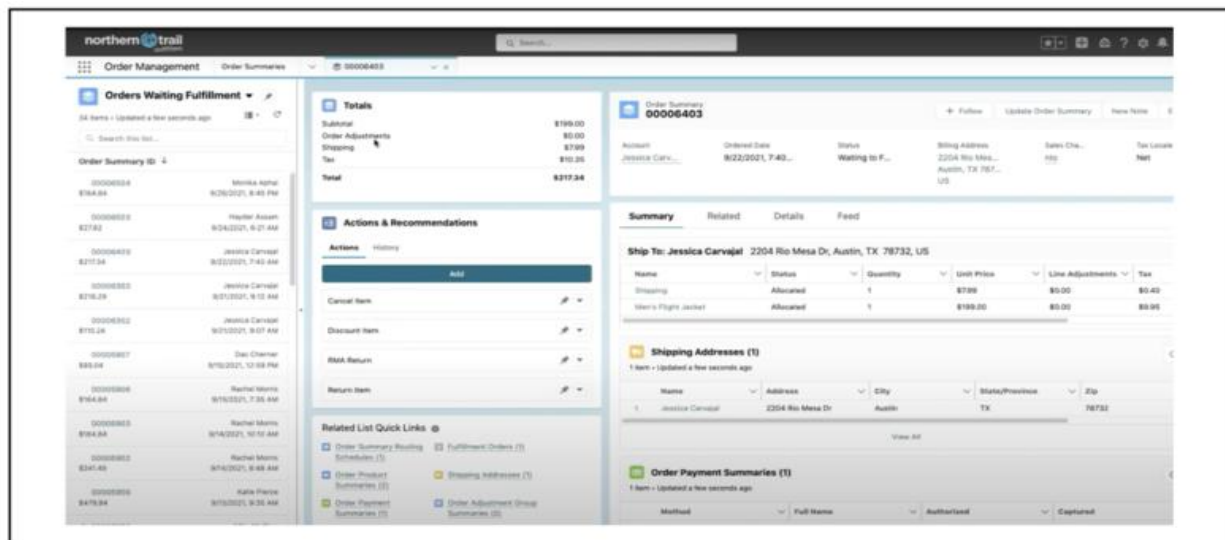


Fig 3 Salesforce Order Management in Commerce Cloud[5]

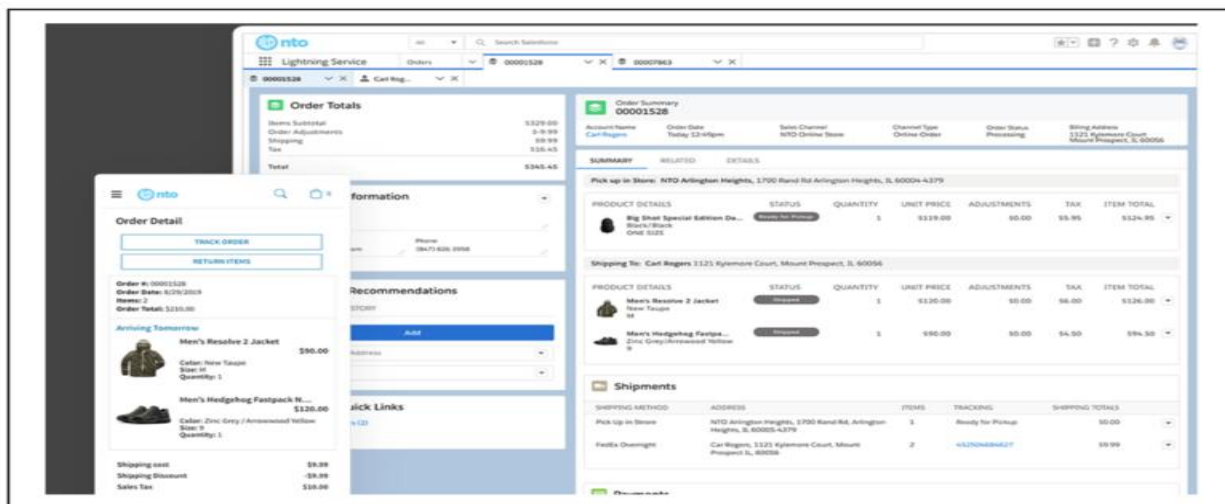


Fig 4 Commerce Cloud to Order Management [7]





## IX. CONCLUSION

In conclusion, the Salesforce Order Management System is crucial for B2B commerce operations looking to improve their e-commerce strategies. It has expanded globally and now supports local currencies, tax calculations, and 35 languages. This allows its commerce, service, and fulfillment capabilities to reach countries around the world.

It provides:

- A powerful, integrated solution for unifying sales channels.
- Managing complex pricing and discount structures.
- Ensuring customer satisfaction through adequate after-sales support and service.

The capacity of Salesforce OMS to automate and optimize the order-to-cash process contributes to notable improvements in operational efficiency, accuracy, and speed, thus enabling businesses to respond nimbly to market changes and customer needs. Furthermore, the leverage of real-time analytics empowers organizations to make data-driven decisions, fine-tuning their strategies for inventory management, customer engagement, and overall performance enhancement. Considering the extensive functionality and potential benefits of Salesforce OMS, it is an invaluable investment for B2B entities looking to thrive in the digital age, fostering strong customer relationships and driving sustainable growth.[6]

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