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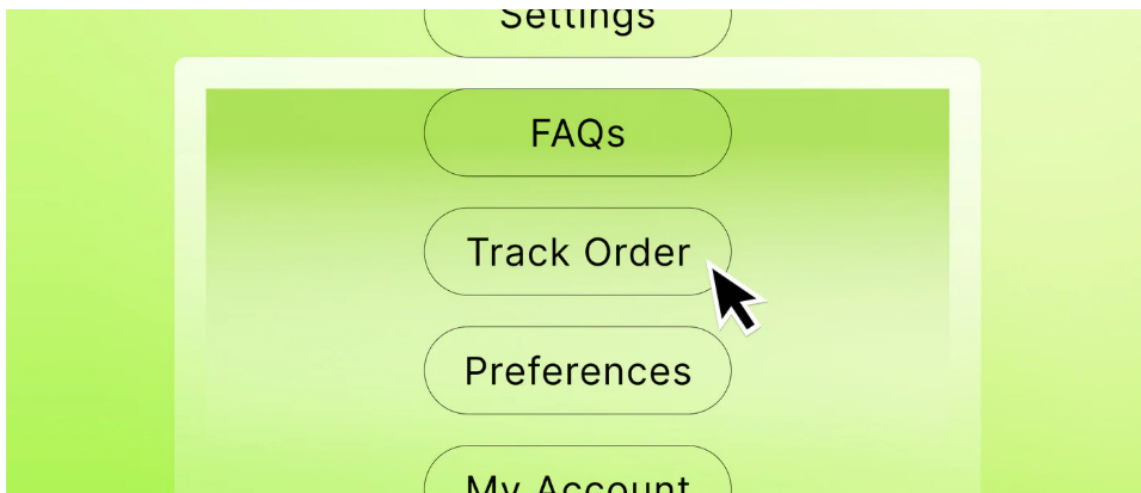
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BLOG | B2B ECOMMERCE

How to Build a B2B Self-Service Portal That Sells

A new era of B2B is here, driven by buyers who expect self-service. Learn the key benefits and features of a B2B portal to boost efficiency and sales.



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The only constant in life is change.

Coined by the Greek philosopher Heraclitus, this popular adage remains as true as ever—even for B2B.

A new era of B2B has arrived, ushered in by a rising demand for delightful, intuitive buying experiences. These expectations are driven primarily by millennials, who are increasingly moving into positions with decision-making power in B2B.

In this article, we'll explore why buyers prefer self-serve options, why they're beneficial to businesses, and how you can get started with a self-service strategy today.

by **Kimball Gardner**

🔍 Reviewed by Lizzie Ficken

Updated on Oct 29, 2025

The platform built for future-proofing

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Explore how to run and grow your B2B business on Shopify

Shopify comes with built-in B2B features that help you sell wholesale and direct to consumers from the same website. Tailor the shopping experience for each buyer with

...offer the shopping experience for each buyer with customized product and pricing publishing, quantity rules, payment terms, and more.

Explore now

Why 61% of B2B buyers now prefer self-service experiences

The way businesses buy from each other is changing. According to a [2024 Gartner survey](#), 61% of B2B buyers would rather purchase without talking to a sales rep.

That preference for self-service also applies to large orders. A [2024 McKinsey report](#) found 39% of buyers are willing to spend \$500,000 or more in a single online purchase.

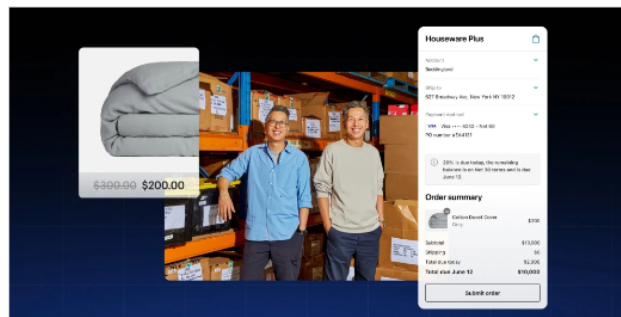
Sales reps are still important, but their jobs are shifting. Buyers seek expert assistance for complex purchases. For simple tasks like researching products, placing repeat orders, and checking on a delivery, they prefer handling it themselves.

Considering millennials' digital upbringings, this shift makes perfect sense. These are people who grew up with the internet—they got to explore and enjoy it before it became a land of walled gardens and endless passwords.

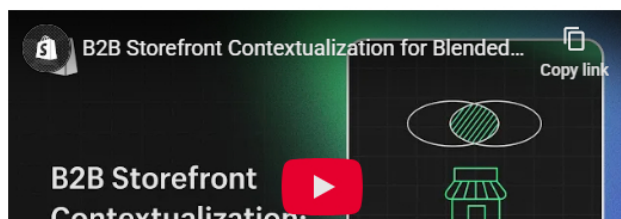
They've witnessed its evolution into the digitally optimized, UX-driven, globally connected ecosystem that it is now—and as the internet matured, so did their expectations.

In a B2B buying context, they want:

- **The ability to buy anytime:** Buyers want to place orders whenever convenient, without having to coordinate with a rep.
- **Clear pricing and details:** They want to see prices and confirm product availability without asking for help.
- **More control:** Online portals let buyers easily track orders, view past purchases, and manage invoices, streamlining their workflows.



Build your B2B storefront on the same platform that powers your DTC website.



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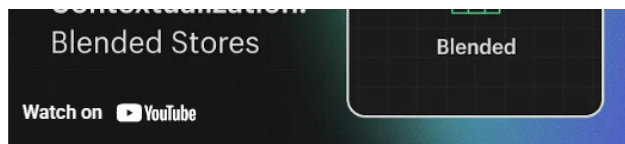
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Build B2B buying experiences fit for a new generation

A new generation is taking over B2B buying, and they expect more. Learn how to delight them with a modern, self-serve buying experience.

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What is B2B self-service?

B2B self-service lets business customers manage their own purchasing online, similar to how they shop on a consumer site. It's a complete experience where they can handle initial research through repeat purchases whenever they like.

A [2024 Forrester-commissioned survey](#) found 73% of buyers expect the same convenient online experience they're accustomed to in B2C, from real-time stock updates to one-click reorders.

Perhaps the industry's most significant shift is toward self-serve experiences for B2B buyers. Intuitive, streamlined self-serve storefronts are vital to winning over this rising generation, mainly because the shopping experiences they're used to have already made this a table-stakes reality.



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B2B self-service vs. traditional sales models

The biggest difference between self-service and traditional sales is the involvement of the salesperson.

- In a traditional model, a sales rep guides every step of the buying process, from the first demo to quoting prices and finalizing the order.
- In a B2B self-service model, the buyer drives the process. They research, configure, and place orders on their own schedule.

Sales reps get involved when the buyer needs them for complex situations like custom projects or compliance questions, precisely when buyers prefer to engage with a person.

Essential B2B self-service portal features

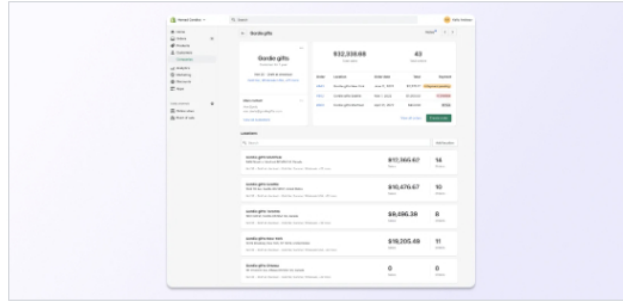
Ecommerce is now a top revenue channel for B2B sellers, with [73% of buyers](#) now comfortable making orders of \$500,000 or more online, up from 59% in 2022.

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Here are the key features your B2B portal needs to deliver a winning self-serve experience.

Customer account management

According to the [2024 McKinsey report](#), B2B buyers increasingly prefer self-service channels for managing their accounts and reordering. A B2B portal acting as a central hub to manage their own information empowers buyers while freeing up your internal resources.



Consider these essential features:

- **Self-serve onboarding:** Before they can log in, new customers need a way to apply. Include a company account request form so businesses can submit their information for approval and access to B2B purchasing.
- **Frictionless login:** Provide buyers with a simple and secure way to sign in using passwordless [customer accounts](#), Shop sign-in, or their own company's credentials via third-party identity providers (single sign-on).
- **Company profiles:** Let customers manage their business information in one place, including multiple locations, associated contacts with specific roles and permissions, and payment terms, within a single [Company profile](#).
- **Self-serve actions:** Allow buyers to easily view order history, reorder past purchases, [customize their account](#), and initiate returns at their convenience.

📌 **Case study:** [Filtroux](#) enjoyed significant growth after switching from BigCommerce to Shopify and implementing Shopify's self-serve purchasing system, tripling their order frequency and saving 12 hours of manual work each week.

Real-time order and shipment tracking

Uncertainty about an order's status creates friction and unnecessary support tickets. Providing buyers with constant visibility builds trust and reduces your support team's workload.

At a minimum, your self-service portal should have:

- An [order status page](#) offering real-time updates on their order, payment, fulfillment, and shipment status
- Automated email or SMS notifications related to orders, complete with tracking links

Custom product catalogs and pricing

DIRECT TO CONSUMER (DTC)

The Complete Guide to Direct-to-Consumer (DTC) Marketing (2025)

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Ecommerce Personalization: Benefits, Examples, and 7 Tactics for 2025

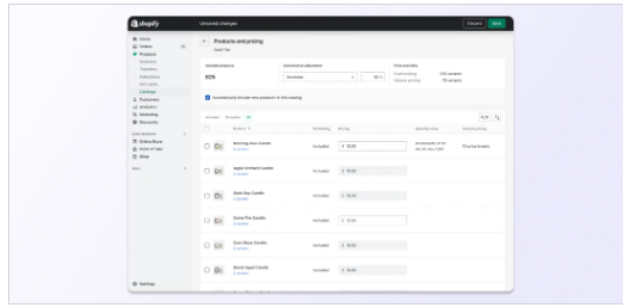
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How To Sell on Multiple Channels Without the Logistical Headache (2025)

ENTERPRISE ECOMMERCE

Composable Commerce: What It Means and Is It Right for You?

Every B2B customer has a unique deal. Your portal must automatically reflect the specific pricing, product catalogs, and payment terms you've negotiated for each customer.



Look for these capabilities in a B2B ecommerce platform:

- **Customer-specific assortments:** Assign unique B2B catalogs to different company locations, allowing you to control which products are visible and at what price.
- **Tiered pricing and quantity rules:** The capability to set volume-based pricing tiers and enforce rules for order quantities—like minimums, maximums, and increments—directly within a catalog.
- **Blended storefront control:** The power to manage both DTC and B2B product offerings from a single online store, including or excluding specific products for different customer segments.

📌 **Case study:** Superfood brand [Laird Superfood](#) scrapped phone-in wholesale orders for a password-protected Shopify portal. The switch [saves \\$50,000 to \\$60,000 in labor](#) each year and flipped the revenue mix. Wholesale now accounts for 75% of total sales, up from 25% previously.

Automated and simplified reordering

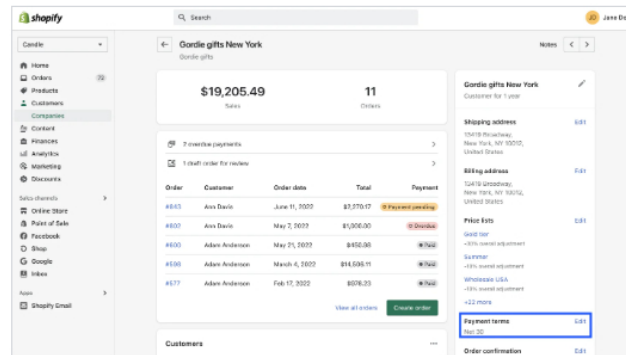
Placing repeat orders should be fast and simple, as should creating new, complex orders. Your B2B portal can eliminate time-consuming manual work by giving customers multiple ways to build a cart.

- **Simple reordering:** A ["Buy Again" button](#) in the customer's order history allows them to quickly repurchase their most common items.
- **Quick-order forms:** For buyers who know exactly what they need, a quick-order list lets them input items by entering SKUs and quantities directly.
- **Draft orders for review:** Let buyers build a cart and submit it as a [draft order](#). This is essential for requesting a custom quote or internal company approval workflows before the order is finalized.
- **Flexible shipping options:** Allow customers to select from their list of company locations or enter a one-time shipping address at checkout for non-standard deliveries.

Integrated payment and invoice management

Flexible payment terms are a core B2B requirement. Your self-service portal should enable you to set [B2B payment terms](#) like Net 30 or Net 60 to a company profile, and apply them

automatically. You can also require deposits and track invoice statuses.



Customize payment terms for B2B buyers in your Shopify admin.

At checkout, buyers must be able to:

- Add a purchase order (PO) number to their order for their internal accounting and tracking
- Pay with vaulted credit cards saved securely to their company profile for faster transactions

Buyers should be able to view and manage their invoices from their customer account, giving them full visibility into their payment history and upcoming due dates.

📖 **Case study:** Australian fragrance label WHO IS ELIJAH implemented custom pricing across their eight expansion stores. Each region had its own catalog and price matrix, driving international wholesale revenue up 50% year over year.

The proven benefits of B2B self-service

Self-service is truly a gold mine for B2B businesses, and it remains largely untapped as many businesses continue relying on legacy platforms that simply can't keep up. Here are the key benefits self-service can bring to your business.

Operational efficiency gains

While it might seem counterintuitive, self-service can actually give greater leverage to your sales reps. It shifts their role into a more strategic one that fits naturally into your buyers' journeys. While buyers often prefer to self-serve at least part of their buying, your sales reps still play a key role.

This hybrid approach of mostly self-service supported by occasional in-person interaction allows sales reps to spend more time with individual buyers, providing the authentic interactions that millennials value.

Using a platform like Shopify, you can equip reps with tools like simple reordering and up-to-date product, pricing, customer, and order data, enabling them to engage buyers precisely when needed to close deals.

Customer satisfaction improvements

We've just touched on how self-service empowers sales

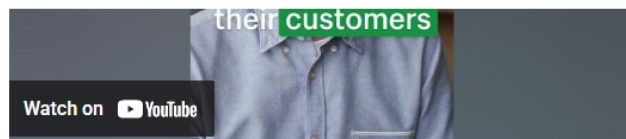
We've just touched on how self-service empowers sales teams, but it also empowers your buyers, granting them greater control of the entire process: They can manage their accounts, place orders, easily reorder shipments, and get support when it's most convenient. Naturally, the outcome—besides more sales—is increased satisfaction and loyalty. And with the right platform, you can offer faster response times and more consistent service experiences, which build trust.

Personalization is another core benefit. Making each moment feel personal to your buyers has long been a key tenet of great customer experiences, and with an advanced self-service portal, you can tailor these moments to meet the specific needs of your buyers. This makes the overall buying journey more relevant and efficient.

Get better customer data

All great commerce experiences run on data and insights, and self-service opens the door to better data collection. Better data means greater insights into your customers' behavior and preferences, which you can then use to improve your services, anticipate customer needs, and identify areas where your customers might need more support.

Running your self-service experience on Shopify also makes it easy to integrate tools like customer relationship management (CRM), enterprise resource planning (ERP), and warehouse management systems (WMS). This way, you streamline your tech stack while gaining deeper, more accurate insights.



Cost reduction metrics

Let's consider how self-service can actually help your business trim down on operational costs. By minimizing the need for direct customer service interactions, a self-service experience boosts efficiency, streamlining processes from order placement to issue resolution. As a result, your staff spends less time and resources on each interaction, allowing you to service more customers at lower costs.

Because the entire process is more intuitive, your support and sales staff aren't bogged down answering questions that the platform can answer for you. Instead, they reinvest their time into strategic initiatives with greater impact on your business's bottom line.

How to implement B2B self-service successfully

There are many ways to launch B2B self-service, but we'll

suggest a clear, practical strategy to use as a launchpad for your own ideas. Here are a few key steps.

Platform selection criteria

When choosing a B2B platform, one decision is whether to build a custom solution or buy an existing one. Buying a platform like Shopify gives you enterprise-grade B2B features right away, saving significant development time and costs.

Look for a platform with:

- **Extensibility:** It should have strong developer tools, APIs for B2B features, and a large ecosystem of apps and partners to connect with systems like your ERP.
- **Integration readiness:** A good platform has certified connectors for major ERP and CRM systems, like [Shopify's Global ERP Program](#).
- **Proven security:** The platform must provide proof of its security, such as a current PCI DSS Attestation of Compliance, and maintain a publicly available security program.

Checklist: How to pick the right B2B ecommerce platform for your business

Run through a short checklist and see if your ecommerce platform is ready for B2B.

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Change management strategies

Self-service is a whole new experience for your sales team, and it's crucial to help them adapt smoothly. Here are some tips for [managing the change](#):

- **Get executive buy-in:** Leadership should champion the new approach. Make "sales reps assist with complex deals, and the portal handles routine orders" the North Star.
- **Update roles and incentives:** Adjust compensation plans to reward sales reps for self-serve revenue that comes from their accounts.
- **Train your team:** Make sure everyone knows how to use the new B2B features, like setting up company profiles, assigning catalogs, and creating draft orders that customers can pay for themselves.
- **Measure and improve:** Track key metrics like the percentage of orders coming through the portal, reorder rates, and the number of support tickets. Use what you learn to make improvements.

B2B self-service success stories

Brands that use [Shopify B2B](#) are seeing clear benefits by offering wholesale customers intuitive self-service

offering wholesale customers intuitive self-service experiences. Here are some case studies:

- Swimwear brand [Kulani Kinis launched a B2B storefront](#) that felt as easy to use as a DTC site. The result was a 3x increase in their wholesale customer base and a major boost in repeat orders.
- Pet accessories company [Tella & Stella created a custom B2B portal](#) to manage both their wholesale and consumer sales in one place. They saw a 23% year-over-year lift in total sales and made ordering much simpler for their retail partners.
- HVAC giant [Carrier used Shopify](#) to launch their B2B sites 90% faster and at only 10% of the cost of their previous methods, allowing them to expand into new markets quickly.

Bring the best of self-service B2B to life with Shopify

We kicked off this article with what may be Heraclitus's most popular quote, but here's another one for you:

It is in changing that we find purpose.

Rather than letting the changes in B2B buying behaviors intimidate you, let them be your focus. By prioritizing the strategies discussed, you'll be well on your way to creating the ideal type of buying experience that today's buyers are expecting.

And we can help.

At Shopify, we're redefining B2B commerce with a platform as practical as it is powerful. With curated buyer journeys, an intuitive self-serve portal, and seamless integration with your tech stack, you'll get all your commerce needs fulfilled, all in one place.

Read more

- [B2B Marketplaces: Top 6 Wholesale Marketplaces to Find Buyers](#)
 - [D2C Manufacturing: Benefits, Challenges, How To Succeed](#)
 - [Modernizing the Frontend and Backroom in B2B Industrial Manufacturing](#)
 - [B2B Ecommerce Apps: Top Solutions for Business Leaders](#)
 - [How To Build Successful B2B Ecommerce Strategy in 2024](#)
 - [B2B SEO Strategy: How To Turn Search Engine Browsers into High-Value Buyers](#)
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 - [The 11 Top B2B Ecommerce Benefits](#)
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B2B self-service FAQ

What is self-service in B2B?

Self-service in a B2B context is a strategy that allows business customers to independently manage their interactions with another business. This approach facilitates tasks like placing and managing orders, accessing account and billing information, resolving support issues, and customizing service options.

What is an example of B2B self-service?

One example is an online wholesale order portal that a retailer uses to purchase inventory from manufacturers or distributors. With the portal, they can browse products, view detailed descriptions and availability, place orders, track shipment, and manage payments—all without needing direct interaction with a sales rep.

What is the meaning of B2B services?

B2B services are transactions and interactions between two businesses. One company provides products or services that another company uses in their operations or production, or for resale. These services include professional services like consulting, legal, and accounting, as well as operational offerings including manufacturing, technology, and logistics.

What does B2B customer service mean?

B2B customer service is the support provided by one business to another in a commercial relationship. It often involves complex interactions like managing large orders, providing tech support, managing logistics, and resolving issues with significant implications.



by Kimball Gardner

🔗 Reviewed by Lizzie Ficken

Updated on Oct 29, 2025

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