

# StoreConnect Features

Valid as of November 2023



# StoreConnect is Customer Commerce

**Salesforce** is the world's #1 Customer Relationship System.

**StoreConnect** is Customer Commerce, built for small to medium business Salesforce users, nonprofits and education.

**Salesforce + StoreConnect** provides the first Commerce solution for small to medium businesses, giving companies back control over user information and systems.

All store and customer information is stored natively on Salesforce, creating a single Source of Truth.

# An Integrated Commerce Solution

- Own your own data
- One system
- Scalable
- Automatable
- Customer Centric
- No bloated plugin purgatory



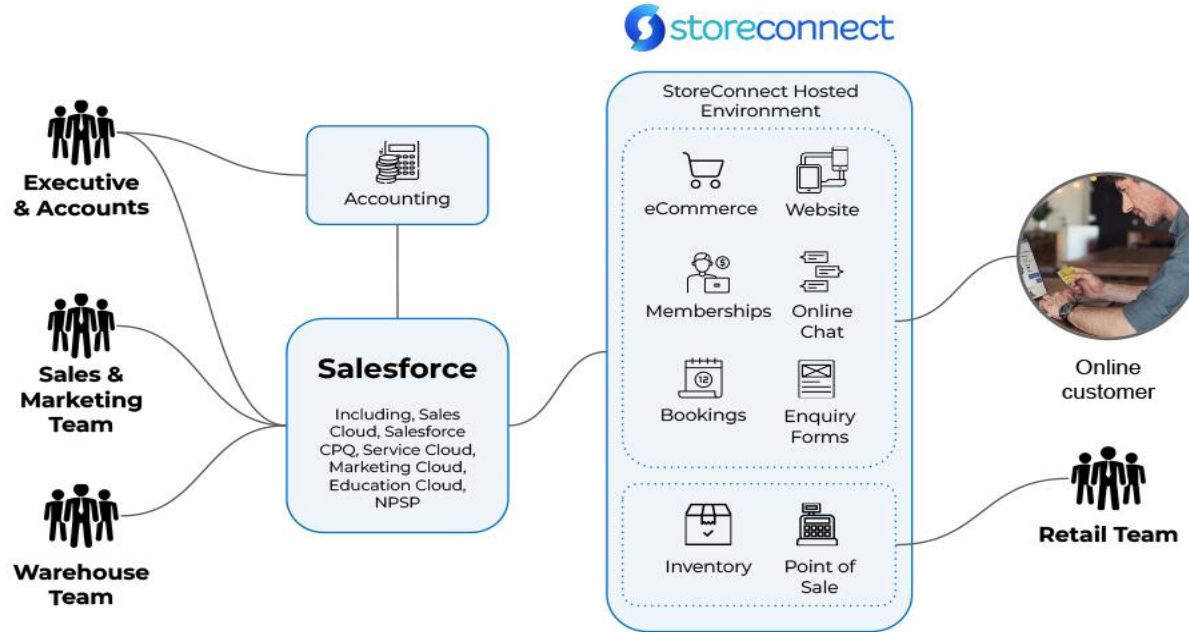


## Our Service

We believe StoreConnect Commerce should provide customers what is needed out of the box as much as possible to reduce integration requirements.

This is why every instance of StoreConnect includes our standard features for no additional cost.

# StoreConnect Architecture Simplifies Commerce



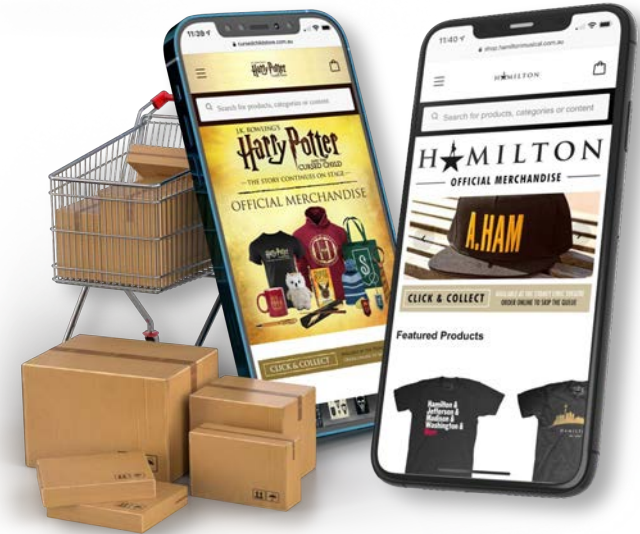
# Store Management

## Flexible / Multiple Storefronts

- Launch new sites easily for seasonal campaigns uniquely branded
- Launch multiple sites based on region and currency
- Manage all sites centrally from the one Salesforce org and licence
- Geolocation redirects for sites based on user's location (added cost)

## Managed in Salesforce

- Uses standard Salesforce objects, including Accounts, Contacts, Product2, Pricebooks, Pricebook Entries, Orders, OrderItems, Campaigns, Users, Leads. (Salesforce Standard Objects)
- Multi-Media support (images, videos, PDFs, files)
- Promotions and Campaigns
- Product Category Management (Taxonomy)
- Product Traits for product filtering and listing specifications



# Site Marketing

## Marketing

- Works out of the box with Marketing Cloud and Account Engagement.
- Trigger marketing automations on customer store activity.
- Track marketing in Salesforce Marketing Campaigns
- Support featured product
- Flexible promotions by date, product or promo code
- Collect web leads in Salesforce

## Analytics

- Insert custom Javascript tracking codes from any platform like Salesforce Pardot, Salesforce Marketing Cloud, Facebook pixel, Google Analytics & Tag Management and any other custom tags/codes
- Integrate with third party A/B Split Testing providers



# Site Marketing

## UTM Code Capture & Reporting

- Track UTM codes used to land on site against both completed and abandoned orders for advertising efficiency
- Track multiple UTM codes, all assigned to the order
- See the timeline of UTM codes that lead to an order

## Product Reviews

- Connect to Google Reviews feed
- Support for other feed services via Javascript

## Chat Systems

- Integrate directly with Salesforce Digital Engagement
- Support for other chat services via Javascript

## Customer Communications

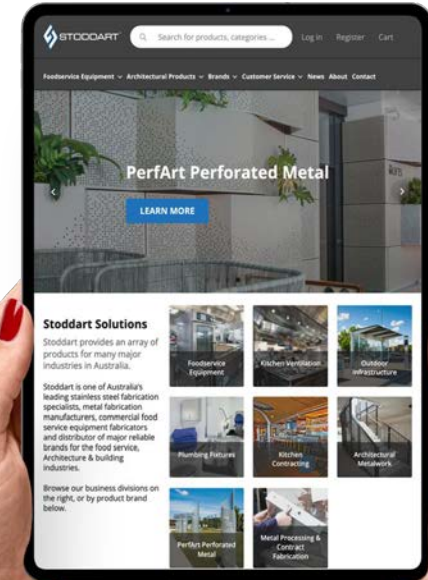
- Flexible/customisable transactional emails. Manage in StoreConnect or Marketing Cloud
- LiveChat/Service Cloud capabilities integration
- SMS via Pendula or Marketing Cloud
- Salesforce Web-to-Lead and Web-to-Case integrations offer web forms to capture enquiries or customer support requests directly into Salesforce
- StoreConnect's Unified Search feature allows your customers to search Products, Product Categories, Pages, and Articles all from the one search bar



# Site Design

## Built in Content Management System (CMS)

- Supports custom HTML, from opening <html> tag to closing
- Create your own CSS
- Import your own Javascript
- Supports Liquid templating language for dynamic content
- Simplified management of pages or articles/blogs
- Reusable content blocks
- Fully customisable mobile responsive design
- Compatible with third party integrations, JS code blocks, or other widgets
- Create customised themes
- Switch between themes dynamically to preview them on live data without interrupting existing design
- Add locales to themes for different languages
- Modify all existing wording on the site



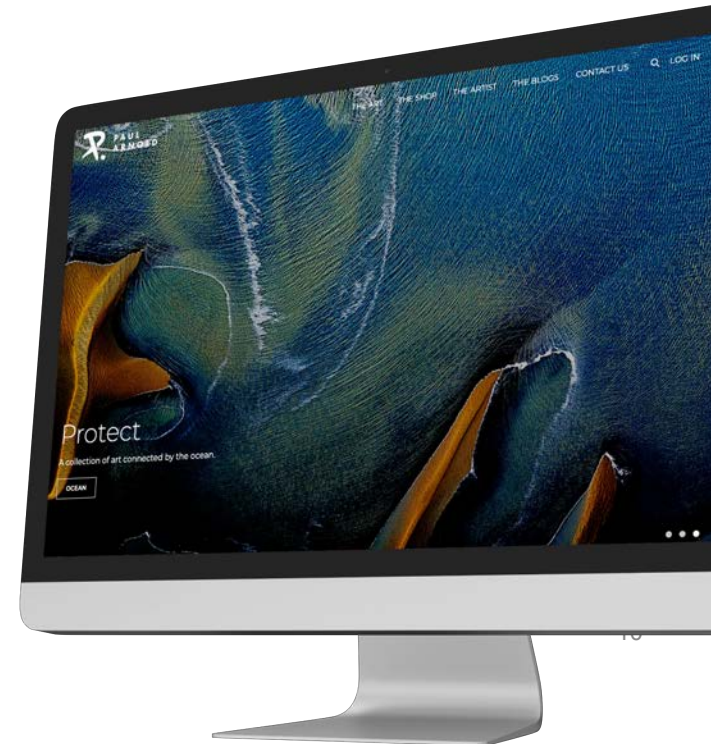
# Site Design

## Search Engine Optimization

- Full control over SEO details for pages, products and articles
- Dynamic Page Information (canonical URLs) and meta property tag support
- Automatic creation of Facebook & Google merchant feeds per store
- Automatic creation of sitemap.xml per store
- Product Rich Text data support
- Clean canonical links automatically generated
- Set your own product URL path

## Menu Builder

- Manage menus within Salesforce
- Set header, footer and other menus dynamically via record relationships
- Reference Products / Pages / Articles or URLs
- Choose from default menu, defined menu or fully customised menu



# Promotions and Discounts

## Promotions

- Promotion codes at checkout
- Set start and end times on the promotion
- Apply the promotion to the single product, the entire cart, buy a product get another product at a discount, get shipping free or discounted
- Set qualifying quantity
- Set a discounted amount or percentage
- Can have multiple scopes of the promotion (discount these products, only if customer is has this membership, etc.)
- Feature a set of products on any page
- Sign up your customers, members or donors to marketing emails lists at checkout

## Discounts

- Discounts applied automatically
- Scoped by store, pricebook, brand,

- product category, product, membership, or account
- Discount by percentage or amount or set a new price
- Set start and end times on the discount



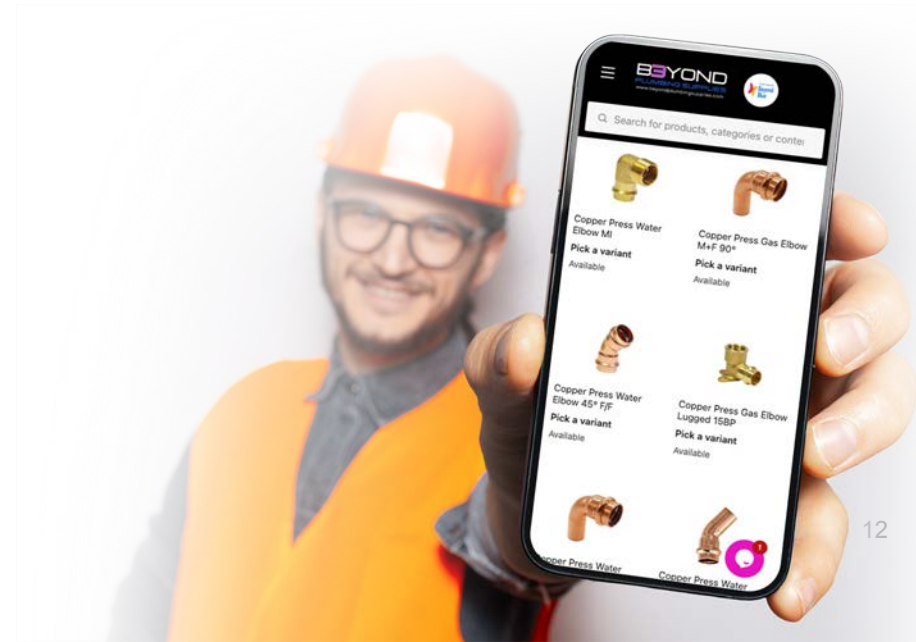
# Vouchers & Accounts Credits

## Vouchers/Gift Cards

- Vouchers & Gift Cards supported
- Purchase on the site
- Redeem on the site
- View balance and usage on the site

## Account Credits

- Provide a credit that can be applied to store purchases
- Account credits can apply to any future order for that account
- Show running balance on site to authenticated user



# Product Management

## Products

- Full product management within Salesforce on Product2 record
- Sell a single SKU product
- Sell variants of a product as their own SKU
- Multiple variants available across multiple options
- Set shipping details (dimensions, weight, available shipping methods)
- Set SEO data (meta tags & search description)
- Product content data defined in Salesforce
- Import content blocks within product data for reusability
- Set multiple product codes (SKU, global, barcode etc)
- Set stock levels (quantity unit of measure, available on date, discontinue on, date allow pre-purchase, backorder, track inventory)



# Product Management

## Traits

- Set available traits via Trait Categories, Types and Values
- Reuse traits across multiple products for reusability
- Display traits on the product page and use them to filter/search products

## Subscriptions

- Support evergreen and fixed term subscriptions
- CPQ Subscriptions compatibility
- Have StoreConnect charge a credit card on a recurring basis
- Have StoreConnect not collect payment, just manage subscriptions
- Customer can update subscription payment card on website
- Customer can cancel evergreen subscription from website



# Product Management

## Products Categories

- Assign products to one or many product categories
- Product categories can have parents, multiple levels
- Products can belong to multiple categories across multiple stores

## Product Tags

- Set product tags on products with any text, for example “NEW” or “RECOMMENDED” overlaying the image
- Style these as desired

## Product Bundles

- Supports Salesforce CPQ product bundles and features
- Support in-page bundling of products

## Restrict Products

- Restrict product display unless approved
- Restrict product purchase unless approved
- Restrict viewing product price unless approved
- Restrict product display or sale by brand
- Show alternate product detail until approved

# Product Management

## Integrated Booking System

- Create bookable products by time and location and session length
- Book in the person doing the booking, or someone else
- Location based filtering
- Availability based filtering
- Save attendee data into Salesforce

## Pricebooks / Price Management

- Set prices by Store
- Set prices by account
- Set prices by Membership type
- Hide prices for unauthenticated users
- Multiple pricebooks per product connected to Store, Membership or Account
- Multiple currencies supported defined by store





# Rewards & Points

- Each Product pricebook entry can have an Earn Points value and a Purchase Points value
- Provide purchasing via Points, Cash or Points & Cash
- Customer can see points balance via logged in experience



# Customer Service

## Case Management

- Manage all customers cases across all stores
- Brand each communication by store
- Bring-your-own-domain for all emails
- High email deliverability and security
- PII compliance
- Link related orders and other records for high efficiency case resolution and personalization
- Case and order reporting to gain valuable insights on leading causes of cases and resolutions

## Telephony

- Integration through Natterbox or Salesforce Service Cloud Voice
- Manage inbound and outbound phone calls all on the same platform
- Per-store inbound lines and IVRs
- Automatic case creation and lookups based on calling customer
- Case deflection through automated order and shipping updates on through auto-attendant or use of Knowledge articles for short solutions or SMS links for step-by-step guides

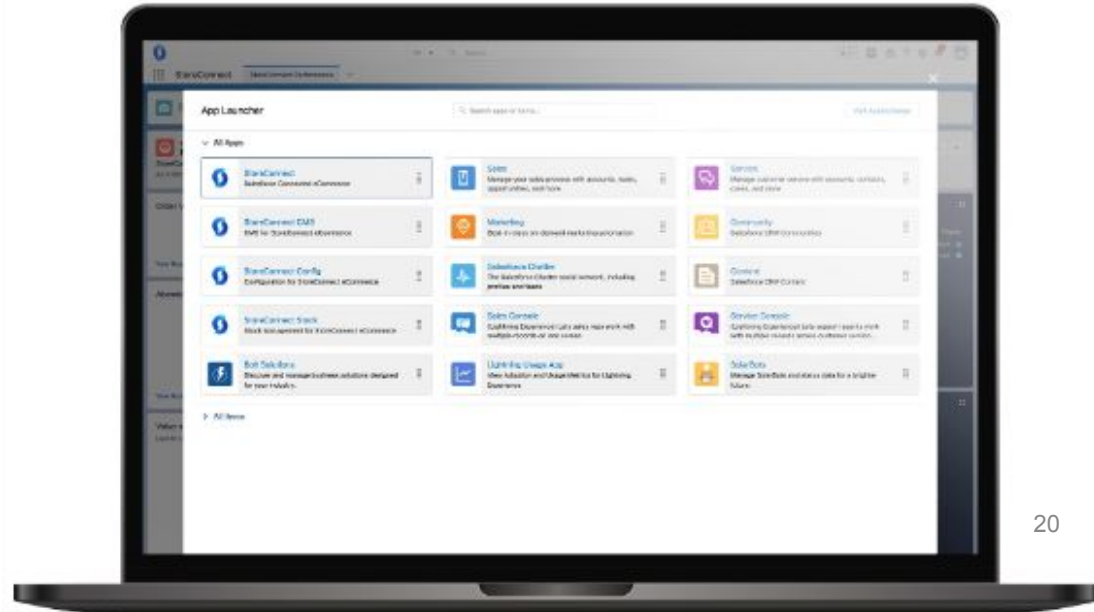
# Point of Sale (GA 2024)

- The world's only fully integrated Salesforce Point of Sale, eCommerce and CMS solution
- One set of stock data to manage for online and in store
- Provide instant and quick checkout
- Works on desktop computer or tablet
- Works with cash drawers & receipt printers
- See stock levels for local store and other locations
- Supports payment by card, cash, layby
- Park orders and resume
- Search orders across other stores
- Add customers to order via lookup
- Start of Shift and End of Shift reporting
- General Availability early 2024



# Extensible with Salesforce

- Extend StoreConnect functionality using Salesforce flows and triggers
- Integrate with other systems via Salesforce
- Build customer or partner experience cloud sites to grant deeper access into StoreConnect records for users
- Use Single Sign On (SSO) with Experience Cloud, Active Directory, Google, etc.



# Works with all the Clouds because **EVERYTHING** is in Salesforce



## **Built 100% on Sales Cloud**

Use all your existing Products, Pricing, Accounts and Contacts.



## **Marketing Cloud “just works”**

All purchase history and activity just syncs simply.



## **CRM Analytics & Tableau**

Full reporting, on platform, right away.



## **Perfect Service Cloud Integration**

All the data for all purchases for your Support team.



## **Single Sign on with Experience Cloud**

Build Experience Cloud sites alongside StoreConnect.



# Powerful Reporting

## Marketing Attribution Reporting

- Use UTM tracking to capture the exact attribution of marketing spend against actual orders / donations, etc.
- Monitor your funnel efficiency with multiple UTM codes per order supported, captured by time
- Use A/B testing and Salesforce reporting to fine tune marketing spend to the most effective channels

## Powerful Reporting Powered by Salesforce

- Customer and behaviour data saved into Salesforce
- Create any customised & detailed reports required on all of your donations, memberships, product, order and customer information using standard Salesforce reports
- Abandoned cart support / reporting
- Subscribe team members to receive automatic report updates
- Staff Assisted Orders allows you to attribute a sale or donation to a specific team member



# Shipping & Inventory

## Inventory & Fulfilment

- Customer Tiered Shipping by Zone
- Ability to integrate with third party carrier shipping integrations on the AppExchange
- Send automated notifications from Salesforce based on order and shipping status
- Add dynamic shipping details to notifications
- Click & Collect support with multiple pick up points per location
- Shipping details listed directly on the order in one place for instant customer service
- Backorder (over sell) support
- Set alerts and reports based on minimum stock values
- Per store inventory for multi store / multi region systems

## Shipping Systems

- Multiple stock locations support with products in multiple locations
- Locations can be restricted for online
- External integrations with ShipStation & Bringg

## Inventory Management

- Multiple stock locations support with products in multiple locations
- Locations can be restricted for online use or not
- Track all movements of stock through transfers and automatic adjustments

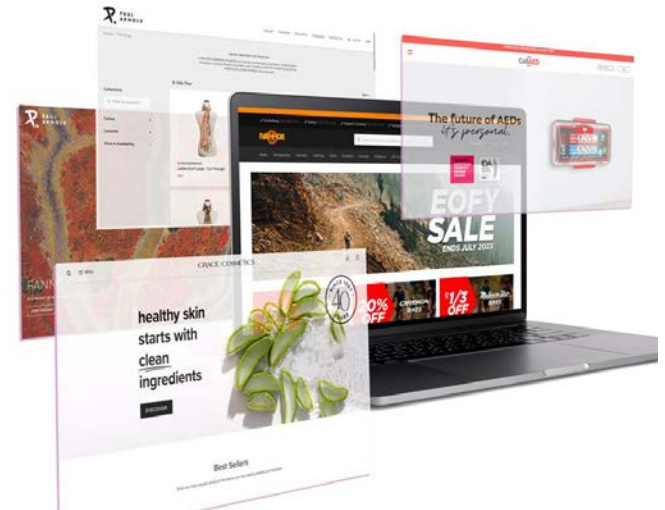
# Contact & Account Management

## Account Features

- Accounts are standard Salesforce Accounts.
- Assign pricebooks to account
- Multiple contacts per account
- Accounts can have credit limits
- Accounts can require PO for purchase

## Contact Features

- Contacts are standard Salesforce Contacts.
- Contacts on account have ability to see/not see account pricing
- Contacts on account have ability to purchase/not purchase on account
- Contacts do not require Salesforce licences to purchase from a store
- Contacts can be associated with Community SSO users





# Accounts & Payments

## Accounting System Integrations

- Connect your accounting system / ERP to StoreConnect via Salesforce
- One connection to maintain instead of multiple
- Single source of truth for all sales

## Flexible Payment & Delivery

- Multiple payment gateways supported
- Supports subscriptions & recurring payments
- Add new payment gateways (fees apply)
- Pay by account
- Create options to pay later including EFT, COD, cheque, etc.
- Use existing EFTPOS / POS terminals for in-store sales

## Take Credit Card payments in Salesforce

- Process credit card payments inside Salesforce from an order received by email, mail, phone or in person.

## Multi-currency

- Multiple multiple pricing can be shown in the one store.
- Launch a new store for each country/ currency managed from same Salesforce org

## Taxation Support

- Tax support by zone/country
- Integration with Avalara Tax for complex multi region tax calculations

## Integrate with



# Technical & Support

## Dedicated Resources

- Emporium & Flagship plans have dedicated web and database servers for optimum performance and client data security.
- Managed scaling of resources as needed.
- Web assets (images & videos) are delivered via Content Delivery Network for fast page-load and to reduce Salesforce data charges

## Standard Support

- Worldwide team
- Annual version updates
- Email support hotline.
- 24x7 Uptime monitoring & support
- Premium support options available

## Disaster Recovery

- All customer information, orders, products, data, pages, and all other configuration information resides in your Salesforce org and is protected by [Salesforce data privacy and security](#).
- In the event of a store failure, a complete rebuild is possible from your Salesforce org within hours



# Let's get started!

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