



Smarter, Safer, Scalable

B2B eCommerce Portals Integrated with SocrateCloud and Pluriva

Personalized pricing, corporate accounts and
bidirectional WooCommerce-ERP synchronization

CASE STUDY

Industry: Distribution / B2B Commerce / eCommerce

Clients: Three companies in manufacturing and distribution

Year: 2026

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INTRODUCTION

Our clients were using Romanian ERP systems such as SocrateCloud and Pluriva to manage customers, products, inventory, pricing and commercial rules. Their websites were built in WordPress, while expanding the digital sales channel required a B2B portal connected directly to the ERP.

A B2B store could not operate with the same pricing and commercial terms for every user. Each customer company had to be correctly identified and matched with the commercial conditions defined in the ERP — on product pages, in search results, in recommended-product sections, when selecting product variations and, finally, when placing an order.

How OPTI built the B2B eCommerce portals:

We designed and implemented an integration layer between the ERP and WooCommerce, allowing the ERP to remain the source of commercial rules while the website became a self-service portal for business customers.

The objective was to keep the ERP as the source of truth while providing a simple and easy-to-use ordering experience.





CHALLENGES

The B2B eCommerce portal had to preserve the ERP's commercial logic at every stage of the online customer experience.

1. Personalized prices and discounts across all screens



The customer-specific price had to be displayed consistently in:

- categories and product listings
- search results
- recommended and related products
- product pages
- cart and checkout

2. Variable products without page reload



The correct price had to be displayed immediately after selecting a variation, without refreshing the page and while preserving WooCommerce's standard, fast behavior.



The system also had to prevent a price calculated for one commercial price list from being reused from cache for another customer.

3. One customer company, multiple identities in the ERP



The integration had to recognize **all related company identities** and apply the special pricing associated with the entire customer group.

4. Bidirectional synchronization without duplicates



The data flow had to work both from ERP to website and from website to ERP:

- a customer marked as eligible in the ERP and associated with an email address had to automatically receive an online store account
- a new company registered through the website had to be created in the ERP
- the company's VAT ID had to be validated in real time during registration

5. Control over products, inventory and pricing



Customers needed a predictable mechanism for synchronizing customers, prices, products and stock levels.



Synchronization jobs had to support both manual execution and automatic scheduling through cron tasks.



For products priced in EUR, the system had to convert prices into RON using the daily National Bank of Romania

exchange rate, while also allowing administrators to set a manual exchange rate and configure the update frequency.



SOLUTION

OPTI implemented custom B2B WooCommerce extensions and an integration layer adapted to each client's ERP environment.

The solution separated three essential responsibilities: **company identity**, **commercial rules** and **data synchronization**.

1. Automatic activation of B2B customers



Eligible customers can be marked in the ERP through a dedicated indicator. The integration then:

- automatically creates the WordPress user
- associates the user with the corresponding ERP company
- stores the ERP identifiers and associated commercial price list
- activates access to B2B pricing



The website registration form creates both the WooCommerce account and the corresponding company record in the ERP.

2. Prices and discounts retrieved from the ERP



The pricing engine identifies the authenticated user, the associated company and its price list, then applies the correct value throughout the store:

- product pages
- categories and search
- recommendations
- simple products
- variable products
- cart and checkout

3. Company recognition by VAT ID



If several ERP records share the same VAT ID, the system groups the associated names and treats them as part of the same commercial entity.



This allows a customer to receive the correct special pricing even when separate offices or operational locations are stored as different records in the ERP.

4. Correct pricing for variable products



A customer should never see another customer's price, even temporarily. For this reason, the WooCommerce cache is also differentiated by commercial price list, preventing prices calculated for one customer from being reused for another.



ARCHITECTURE

The integration built by OPTI keeps commercial data in the systems where it is already managed and exposes to WooCommerce only the information required for B2B purchasing UX.

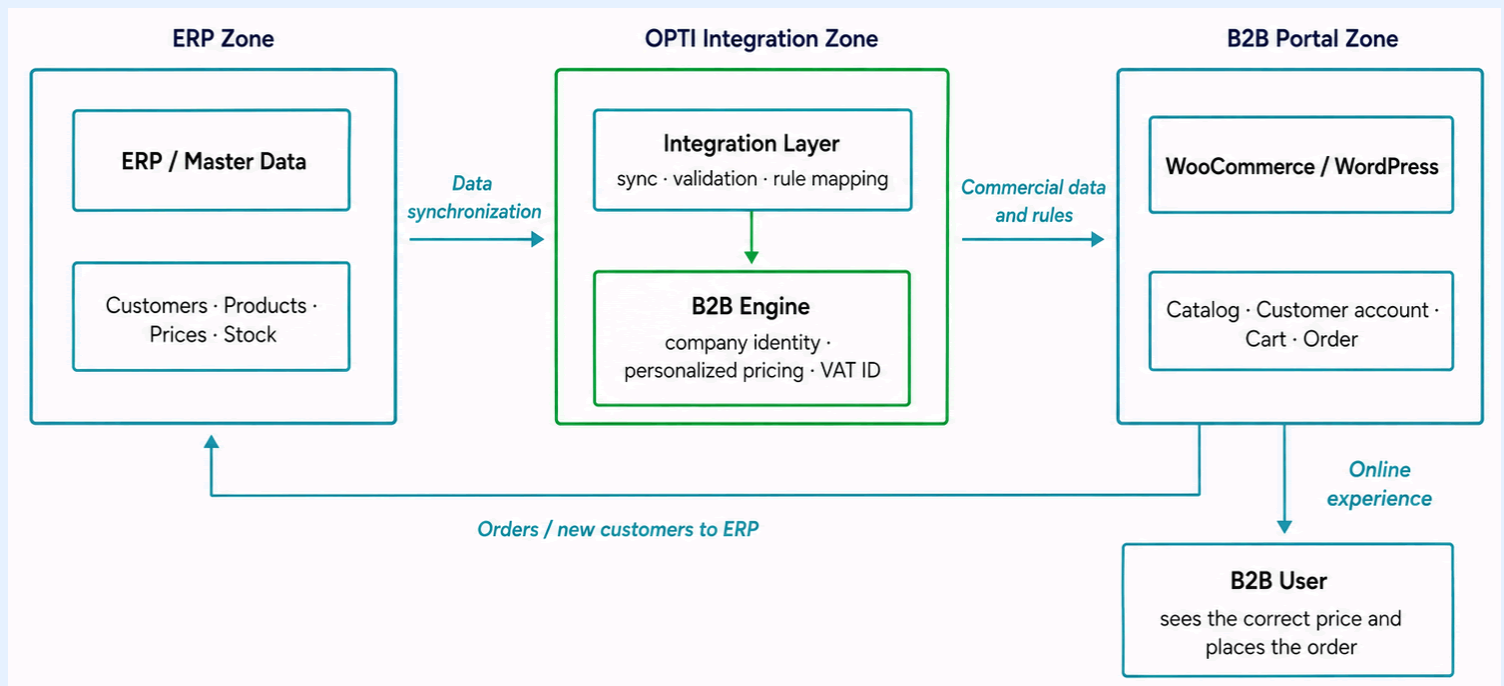


Fig. 1. The ERP remains the source of truth, while the B2B portal uses the integration layer to access the data and commercial rules required for the online experience.

A WORD FROM THE TEAM



"In B2B, the challenge is not only synchronizing products. Pricing, company identity and commercial rules must remain consistent at every point of the customer experience: catalog, product page, cart, order and customer communications."
— **Daniel Curculescu, Data Engineer**



RESULTS

B2B sales portals where customers browse, search and order using their ERP commercial terms.



5.000+ B2B customers synchronized

Customers are synchronized between the ERP and the portal together with their identifiers and associated commercial terms.



Automatic activation of new customers

For new B2B customers, the website forms create both the online account and the corresponding company in the ERP.



1.000+ B2B orders / month

Orders use customer-specific pricing and populate the corresponding ERP data model.



On-demand currency rates

Administrators control the update frequency and use a manual exchange rate whenever required.



Full control over sync

The team can synchronize customers, prices, products and stock independently.



Launch without downtime

All B2B portals were launched without downtime and without affecting existing B2C orders.

TESTIMONIAL

"OPTI manages projects in a very organized and efficient way. They communicate clearly, respond quickly to requests and adapt when technical requirements change during implementation. They delivered the platforms within the agreed timeline and were consistently proactive in improving them."

—Roxana Chițu, Project Manager

TECHNOLOGIES AND METHODOLOGY

Services: business analysis, ERP-eCommerce integration, WooCommerce extension development, backend development, data synchronization, QA, controlled rollout and support.

Tech: WordPress, WooCommerce, PHP, MySQL, REST/API integration, cron, SocrateCloud / Pluriva, bank exchange-rate integration.

Methodologies and best practices: business-rule mapping, defining a single source of truth for each type of information, incremental implementation, B2B test matrix, regression testing, cache-isolation testing, controlled rollout.

Standards: ISO 9001 for quality management, ISO 27001 for information security.

LEARN MORE

- ⇒ Read our case study on [HubSpot CRM Integration for Sports Ticketing — 100,000+ Tickets](#)
- ⇒ Read our case study on [Price and Stock Monitoring — Price Intelligence for Thousands of Products](#)
- ⇒ Read our [Guides to AI Integration in B2B Workflows in 2026](#)
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OPTI Software

Smarter business processes. Scalable results.

We build **software**, **AI agents** and **data integrations**, alongside Google Cloud and HubSpot CRM services, with certified expertise.

In 2026, our projects received multiple awards and distinctions, including **Best R&D Program of the Year** at the ANIS Gala and **Bronze Startup of the Year** at the RO Startup Awards. Founded in 2005, OPTI is a HubSpot Solutions Partner and Google Cloud Partner, with individually certified specialists across the technologies we use.

CERTIFICATIONS



KNOW-HOW

