1. Can I easily transfer my existing customer profiles, order history & product data from an existing expansion store to a new store that uses this feature set?

Today, you can easily attach existing customer profiles to a Company so you don’t have to replicate the customer information you already have. In the next month or two though, we will launch migration tooling that will make the entire process of transferring data over to our new feature set much easier. We’ll share this tooling with merchants as soon as it’s available. Be on the lookout for more information!

2. Can I segment my orders in a blended store to see reports for B2B only?

Yes. Merchants will now see an additional filter on their reports that will allow them to filter reports by the B2B sales channel. The filters will be available for all Sales, Orders, Profit Margin, Customers and Finance reports. When merchants click on the “manage filters” on a report, they will see an option to add a new B2B filter. From there on, selecting “yes” will filter their report to only show B2B data and selecting no will remove all B2B data from the reports. The default state of reports with no filters shows a blended view of B2B and D2C.

3. Can I display the retail/compare at price in my wholesale store, next to the discounted pricing?

Yes. The best way to do this today is to add a custom metafield to the necessary products and call it, for example, "Retail Price". You would then populate the metafield with the retail price for those products and it would show up for customers on their end.

4. Is it possible to allocate inventory for B2B specifically without duplicating products?

This is possible within a Dedicated expansion store for B2B as it is inherently specific to B2B and requires a separate connection to systems that hold inventory. However within a blended storefront, B2B-specific inventory is not yet possible. It will be shared between D2C and B2B customers.

5. Can I set the minimum order quantity per product, and total? Different free shipping point than on a regular shop?

Per variant, yes. Per product, not yet. For the order as a whole, yes, using metafields and shipping functions. Order total minimums are also on our near future roadmap, at which point we’ll offer them as a core feature.
6 Can I exclude B2B customers from discount Codes?

Yes, using customer segmentation. Merchants will first create a customer segment for all DTC customers to ensure only they will be able to use the discount code, within the customer index page.

The segment should include “company as null” and be saved as “All DTC”, or something that your team will intuitively recognize. You can then create a discount code and apply it to their DTC customer segment, under Customer Eligibility.

7 Can I transmit the VAT ID from B2B users to our ERP (Plentymarkets)

Yes, the B2B buyer’s VAT ID can be recorded within Shopify and queried by ERPs via API but this does depend on the ERP connector accessing this data. We don’t know whether Plentymarkets has utilized this capability, but it is available.

8 Why can’t B2B customers who have 30 days payment terms create their own orders via the site?

They absolutely should create their own orders. If you are finding that your customers are unable to do so, please reach out to our support team.

9 When do you plan to allow CSV or bulk upload of Companies and Locations?

This is currently available via a third party app built by Matrixify and can be installed from the app store. Otherwise a custom connector can be built to do this via our suite of B2B APIs.

10 Can we bulk upload existing company information from our source of truth system where this normally sits?

This is currently available via a third party app built by Matrixify and can be installed from the app store. Otherwise a custom connector can be built to do this via our suite of B2B APIs.

11 When will you create a way for us to export a list of companies/locations and their respective Catalog?

This is currently only possible via the APIs.

12 Is this available for other plans other than Plus?

B2B on Shopify is exclusive to Plus merchants and is included in your Plus subscription.

13 Do you plan to release a feature to set up a minimum order value or minimum order quantity?

Minimum order quantity for variants is available today through quantity rules. Quantity rules is part of Catalogs and will be available to all merchants by the end of March when it goes to General Availability.

Minimum order total is on our roadmap for 2023.
14 Can you elaborate on the “Self serve portal” feature?

Yes, the self-serve portal is designed to make it easy for your customers to place and pay for their orders and manage their own account without needing to reach out to your team.

Once customers are logged in, they'll be able to view their order history, pay for orders as they become due, vault credit cards on file or edit existing credit cards, and manage customer information.

Note: within your admin, you'll be able to set a permission level for each contact. Only contacts set to the permission level of admin can modify account information. They will also be able to see all orders for the company locations they are attached to.

15 Is B2B restricted to a specific theme or can we customize the storefront theme just like we do with our main DTC store?

No, all themes are available for B2B.

16 We would like to handle several counties with unique price lists and currencies. Is this possible?

Yes, you can create catalogs with price lists and assign them to buyers in specific countries with their local currencies (using Shopify Markets).

17 Can shopify POS be used with B2B to generate quotes & invoices?

B2B isn’t currently integrated in Shopify POS but we do have plans to integrate in the future.

18 Our B2B stores need to display product data like barcodes numbers. Will you create liquid variables for things like barcode numbers to show them on product pages?

We don't know of any plans to generate barcodes, but we believe this could be done with custom code.

19 How do B2B restrictions show on the front end for both DTC and B2B customers? Would the B2B customer be able to see pricing prior to signing in to see their price list

B2B customers will not be able to view wholesale pricing prior to logging in. If you decide to go with a blended store, a single store for both B2B and DTC orders, then the buying experience would not change for your DTC buyers but B2B customers could navigate to the login page from the DTC front end view.

20 Is there a way to create a return authorization?

We don't have flows in B2B for this specifically. We intend to launch B2B returns later this year.
21 Is it possible to change the way taxes are shown at checkout? We want to exclude taxes from product prices but show the total tax at checkout.

Yes, this is supported in the same form as DTC.

22 What’s the difference between the wholesale channel and B2B on Shopify?

The wholesale channel is our legacy wholesale solution and was built as a 1P app that’s installed on your Shopify storefront. As a 1P app, there is a very little room for customization. Merchants have one theme to choose from and cannot really customize the buying experience if something is not offered out of the box.

B2B on Shopify on the other hand is built directly into the core of our platform and is part of the Online Store. With very few exceptions, anything you can access for your DTC store you can do for B2B - including things like choose from custom themes, create easy customizations with Scripts and Functions, access our APIs or 3p apps to solve for unique use cases. Plus, you can sell to B2B and DTC from a single store to save valuable time and manage a single storefront for all sides of your business.

23 Can I work with agents or sales reps? We use sales reps to create orders for different companies?

We plan to launch some sales rep capabilities in 2023. They will be available within the admin once launched. Sales rep capabilities will allow staff accounts to be created and give sales reps the ability to create orders on behalf of specific companies.

24 Is it possible to create “Company Groups” to assign price lists for many companies at once?

Yes, once a catalog is created it can be assigned in bulk to selected companies from the Companies index.

25 Can payment terms be set with part of the payment due now at checkout and part of payment due after 30 days?

Not yet. Split payments are a hot topic for our team and something we intend to build for in the future.

26 Are you going to show how to customize the front end of the B2B store with branding and logos?

Yes, in our next Build With Us session on April 6th we will focus on customizing your B2B store.

27 Do customers have access to modify account info? Like add a contact person

Contacts cannot add a new contact but those with the permission level of “admin” can change account information such as billing addresses, credit cards on file, and more. These permissions are set by merchants within the admin.
28 Do you plan to offer an email template for resending a customer's access to the B2B store? (rather than sending them another “welcome to our store!” email)

This is not on our roadmap right now, but we will take this back to our team.

29 Can Companies (not customers) select manual payment methods when checking out with a draft order?

We’ll need to better understand the use case. Manual Payments are typically used to offer net terms, and payment terms are supported out of the box in B2B. Support for manual payments for B2B (in the form that exists in DTC) is not on our roadmap.

30 Can you exclude a single variant from a catalog with more than one variant?

Currently, our publishing rules are at product level. We'll take this feedback to our product team.

31 Any plans to give customers a normal login experience with a password so they don’t have to use an email verification code every time?

We do have a couple of alternative login options on our upcoming roadmap for B2B. Sign in with Shop will be one of those options.

32 Can we set currency by location- ie Chicago location in USD, but Toronto location in CAD?

Yes! There are two ways to sell in multiple currencies within your B2B store:

1. If your store uses Shopify Market, then the prices in your online store, cart, checkout, and draft orders reflect the local currency of your customer. The currency that is based on your customer’s shipping address is converted based on automatic or manual currency exchange rates. Rules for rounding prices that you set in your Markets page do not apply to B2B customers.

2. If you want to specify fixed prices for products without performing a currency exchange, then you can manually set a preferred currency for price lists when you create them within the admin. The price for products with a fixed price set are not adjusted.

33 How do we show MSRP against the new catalog price?

You can add a custom metafield to your product variants titled “MSRP”, or whatever is most accurate/intuitive for your customers.

You would then need to add in the retail price for each product. The metafield information would then be displayed to customers from the online store when browsing products via themes/liquid.
34 Do you plan to allow quantity based pricing in the future? E.g 1-5 units are priced at £5 each, 6-10 units are £4 each etc

Yes, this is coming soon. We expect to launch volume pricing in Q2 2023.

35 What's the best way to embed a 3D model to a product page?

We would recommend you reach out to Support or our partner ecosystem. If it's possible to do within the Online Store today, then you can implement it for your store, regardless of whether its for B2B or DTC.

36 Is it possible for a B2B customer to import many orders at once via CSV file, with different shipping addresses for each?

This is not possible today, but we are introducing B2B buying workflows in Q2 and Q3 of this year. This will make things like a variant grid view and quick order list possible so that it's easy for customers to place orders in bulk without a big time-investment.

37 Do you plan to publish another B2B roadmap?

We shared our updated B2B roadmap in today's session! We'll be sending the recording to all registrants and you can review all of the items we are committing to for this year in the beginning of the session.

38 Is BOPIS available?

BOPIS via Shopify's core features is not currently available for B2B. However we do have a custom solution to share:

- Option #1 - Use 3P apps, like Store Pickup by Genie Apps.
- Option #2: Configure a custom shipping rate for local pickup and leverage delivery customization functions to only show that shipping rate to B2B customers.

39 How can we manage multiple customers that use the same email address?

Some email provider allows you (or your customers) to modify the email slightly to create a “new” email address that will still send email communications to the same inbox as the original email.

I.e. ben.smith@shopify.com, can then be edited to be ben.smith+person1@shopify.com and it will be recognized as a unique email within the admin and still send communications to the original inbox.

40 Is it possible to show a variant order table in the product page such as the one in the Wholesale channel?

We are working on this as we speak! Variant grid view is on our roadmap for 2023, and we hope to release it by the end of Q2.
Frequently Asked Questions

41 In a blended store, is it possible to have certain products only available to B2B Customers? (Multipack products)

Within a blended store you can segment the products that different B2B customers are able to see, but you cannot segment the products that DTC customers see. If you’d like to offer different product selections to your DTC customers versus your B2B customers, we recommend you use a dedicated store.

42 How can I identify a B2B customer using document verification for tax exempt status?

Tax IDs can be assigned to company locations, as well as specific tax exemptions. However, we don’t currently support verification of the tax exemption certificates.

43 Are there themes that are better suited for B2B than others?

It depends on your needs. All themes are available for merchants to use for their B2B business, and you can customize the theme using Liquid.

Later this year, we will also introduce B2B buying workflows which will include support for things like variant grid view and quick order lists.

44 Are B2B on Shopify and "companies" compatible with Shopify POS?

Not yet. As of today, POS is not compatible with B2B. However it is something that has been discussed by our team and we’d like to hear from you and understand the use case if this is something you’d like to see.

If the use case for POS is around sales rep functionality, we’d also like to note that we intend to release a first version of Sales rep functionality by this summer.

45 If it is a blended store - how will the interface change once a business customer logs in?

Wholesale products, prices, and payment methods and terms will only be visible once the customer logs in and is authenticated. The look and feel of the website will be largely the same for B2B and DTC customers within a blended store, but B2B customers will see the information specific to their buying context.

46 Is there a way to connect our B2B store to an EDI platform?

We do not offer EDI functionality out of the box, but we are investigating a possible first-party EDI integration in the future. For now, if you’d like to support your EDI business via Shopify, we recommend working with an integration partner such as VL Omni or SPS Commerce who offer existing solutions.
47 Can you customize the acquisition page for B2B vs. DTC?

In the next few months, we will be releasing a “customer account request” feature that will allow you to accept new customer applications on your website and easily add their details to your admin if they are approved.

If you need an immediate solution, many 3P apps offer this feature so you can add it to your B2B store. The fields included are typically customizable.

48 Is it possible to have different shipping rules or free shipping for B2B orders while charging shipping for DTC orders?

Yes, using shipping functions in checkout, it’s possible to segment B2B and B2C buyers and modify and reorder the available shipping options accordingly.

49 Can we set up our B2B store so that clients can only view collections based on their customer tag?

Yes, but not with tags. Our new customer-specific product publishing feature allows you to curate the products that are shown to customers and you can include and exclude these products from Catalogs directly within the admin. This feature will be accessible to all Plus merchants by the end of March.

50 Can you customize the checkout for additional order details like PO number?

Yes, this can be done using custom metafields today. However, soon this won’t be necessary. We will be releasing built in support in B2B checkouts for PO numbers in early April. Once released, customers will see a dedicated field to enter a PO number at checkout. They will also be able to view their PO numbers on orders within Customer Accounts.

Order details, draft orders and customer self-serve and our APIs will also all support PO number functionality.

51 Is it possible to apply different shipping costs and discounts like “free shipping” to B2B and DTC customers in a blended store? For example - I don’t want B2B customers to automatically receive a free shipping discount.

Yes, with delivery Functions. With Functions, merchants can segment the shipping and payment options shown at checkout, depending on the buyer context (B2B vs DTC).

52 Is there a way to create a custom tax exemption for B2B customers based on an items class, item tags, or something similar?

Tax exemptions can be set within the company location profile, within the admin under “Companies”. However, we do not currently support custom tax exemptions.
53 Can we show different prices to different customers based on their tier?

With price lists, you can easily create different price lists for different tiers of customers.

You can set prices via percentage off discounts or fixed prices. You’d then just need to assign the right price list or price list to the companies it applies to.

54 Can a company owner or business customer edit user permissions themselves?

No, they cannot. Permissions can only be adjusted from within the admin.

55 Can we allow customers to mix and match variants to meet our minimum quantity? This is currently available on the wholesale app

Not yet. This should be possible with discount Functions once they are available for B2B. The ETA for this feature is early Q3 2023.

56 Where do we create a B2B blended store? We already have a DTC store and I want to add B2B to it.

B2B features are automatically enabled within any Shopify Plus store, regardless of whether it's used for B2B or DTC. I would highly recommend you checkout our help docs to see our setup checklist which will guide you through the steps needed to setup your B2B store. See link.

Within your admin, under “Products” you should see a Price Lists or Catalogs tab that will allow you to create customer-specific pricing. Under the “Customers” tab, you should see a Companies tab where you can set up your business customer profiles.

These are the typical areas where merchants start setting up their B2B store.

57 Can you create custom tax exemptions for B2B clients per item / collection? Many of the items we sell are not tax exempt.

Tax exemptions by product or collection are not supported today. We haven't heard this specific request yet but will add it to our internal database so we can continue tracking merchant demand for it.

58 I don't see "catalogs" in the admin. I only see "price lists". Are "Price Lists" the same as "Catalogs?"

Price lists are part of Catalogs, along with customer-specific product publishing and quantity rules.

Catalogs is still in early access, but it will be available to all Plus merchants by the end of March. Stay tuned!
59 Are you able to import products using CSV like you can with DTC?

Yes, and you can also import product catalogs. This allows you to automate product pricing and availability per company location.

60 Can we have an unlimited number of price lists and catalogs?

You can create as many price lists as you want, however, each company location can only be assigned up to 25 price lists.

61 Do we have to enable Shopify payments to use Vaulted Credit Cards?

Vaulted credit cards are only available for merchants on Shopify Payments, which is different from Shop Pay. If you have Shopify Payments, vaulted credit cards will automatically be enabled in your B2B store.

62 Can you add different payment gateways? Or are you locked into Shopify payments?

You can use other payment gateways with B2B on Shopify. It is up to you, and what works best for your business. However, note, vaulted credit cards are only available for merchants on Shopify Payments.

63 Is B2B the same as the wholesale channel?

B2B on Shopify is completely separate from the wholesale channel and is our premier wholesale offering. While the wholesale channel is a first party app and siloed sales channel, our new feature set is part of the Online Store and built into the core of our platform.

This allows merchants using B2B on Shopify to combine our all-new wholesale features with the full power of the Shopify platform. In addition to all of our B2B-specific features, merchants can use themes, APIs, Scripts/Functions, 3P apps, and more, to support their B2B business.

All of the new features we released at Winter Editions (see here) are only available on B2B on Shopify.

64 We currently use the wholesale app from Shopify and want to convert to the B2B channel. Is there an easy way to update existing customers?

In the next couple of months, we will make migration tools available for you to use to easily transfer your existing customer data from the wholesale channel to our new feature set. Stay tuned!

65 When will the payment options extend to PayPal, direct bank deposits?

Paypal support is something that our team is exploring right now, and hope to launch within the next two quarters. ACH/bank deposits are also on our roadmap to release by the end of 2023, as we know this is a high priority for B2B merchants.
Are wholesale subscriptions on the product roadmap?

It’s not on our current roadmap, but we recommend you look to our app and partner ecosystem to see what’s possible today. Many 3P apps offer subscriptions functionality and may be already compatible with our new B2B feature set. To confirm individual app compatibility, we recommend you reach out to the app developer, as they are the experts on their product.

Will PO numbers be searchable?

Yes! PO numbers will be searchable and visible within the admin for merchants.

How do I access checkout functions?

To review Functions as a whole, checkout our dev docs overview. For more specific information on payment Functions or delivery Functions, click on their respective links.

Will volume price breaks be available later this year?

Yes. We intend to release volume pricing as a core feature by the end of Q2 or early Q3.

What are the pros and cons of a blended or dedicated store?

A blended store is a single storefront that accepts both B2B and DTC orders with the experience largely staying the same for DTC customers. B2B customers must be authenticated prior to seeing B2B pricing and products.

Advantages:
- One storefront to manage and maintain
- Shared data/inventory
- Can lead to greater efficiency and time savings
- Experience segmentation is possible. You can segment payment and delivery options via Functions.

Considerations:
- Some experiences cannot yet be segmented by customer type, such as store theme and notification templates

A dedicated store is a separate (expansion) storefront for B2B orders only, and only authenticated B2B customers will be able to access it.

Advantages:
- Full customization over the buying experience. As this store type is only for B2B customers, anything you change or implement will only be shown to them and not your DTC customers.
- Separate inventory flows for B2B and DTC customers

Considerations:
- Must maintain two storefronts
- Data is not shared between the two stores