

BUILD WITH US

Migrating to B2B on Shopify - Webinar Q&A

Where can I find a demo of B2B on Shopify and its features?	You can find a demo of B2B on Shopify on the B2B Resource Hub , alongside other B2B resources and how-to videos.
Are you planning to release a second version of the migration tool that will allow me to attach multiple customers and their order history to a single location? What about creating multiple locations for a single company?	Yes, we are planning to continue to make updates to the migration tooling to simplify the migration process. First, we'll add support for migrating price lists that use volume pricing. Then, we plan to add support for migrating multiple customers and their orders to a single company.
I'm on classic customer accounts for my DTC store. Do I need to migrate my DTC customers to new customer accounts to operate a blended store?	If you're operating a blended B2B and DTC store, you can continue to use classic customer accounts. However, since B2B uses new customer accounts you'll have to set up separate login links on your online store, and make sure to direct customers to the correct login experience.
Is tiered pricing / volume discount available in B2B now from the Wholesale Channel?	<p>Volume pricing for B2B on Shopify will be released in the next couple of weeks. With this new feature, you'll be able to set up price breaks based on the quantity of an item being ordered. For example, if you order 100 of a product, each item would be \$10 instead of \$12. Volume pricing is set at the variant level.</p> <p>Tiered pricing, where the first 50 products are \$12 and the next 50 are \$10 is not built into B2B on Shopify, but may be supported through our app ecosystem.</p>
Will B2B have split payments/partial payments? This has been a major crutch from a wholesale perspective.	We know that split and partial payments are critical to running a B2B business, and are starting work to support these features. There are no timelines we can share just yet.
Is everything being discussed today available to use, today?	All the features discussed in the webinar are currently available, unless our speakers specified that it was coming in the future.
If we use an expansion store for wholesale, is there a way to import all existing customer accounts and previous purchase data?	If you plan to set up B2B on Shopify on a different store than where you currently have the Plus wholesale channel installed, the first step of your migration will be moving your data from the current store to a new store. Then you'll be able to use the migration tooling to set up customers as companies, and convert their orders to B2B orders.
Will we be able to do net terms?	Yes, payment terms are a core feature of B2B on Shopify. You can set distinct terms for each location of a company, including Net 7, Net 15, Net 30, Net 60, Net 90 and due on fulfillment.

Can you start by migrating only a few wholesale customers to test it?	Absolutely. You can migrate customers in small groups to test the process. Migrating in smaller groups is also useful if you want to choose different migration settings based on the group. You can migrate up to 250 customers at a time.
Can we migrate product pages, customer profiles, order history, and discount tier system over?	If you're setting up B2B on Shopify on the same store where you currently have the Plus wholesale channel installed, you won't need to migrate product pages. For customer profiles and order history, you can leverage the migration tooling. Your wholesale channel price lists can be moved to B2B on Shopify as well (with the exception of volume pricing, which is coming very soon).
Are we limited to a number of price catalogs we can create?	There's no limit to the number of catalogs you can create. However, there is a limit to the number of catalogs you can add to each company location. The limit is 25 catalogs per location.
How do you know if integrated or separate stores are better for your business?	Our help docs include context to help you make this decision. Some factors you may wish to consider are whether your B2B and DTC business are separate legal entities, if you want to keep inventory separated, or if you have separate back office operations or teams for each business line.
Will the new B2B be able to be added to the dashboard as a separate channel? Not just filtered in the advanced report.	This feature is not currently available, but we're exploring adding B2B dashboards.
Catalogs don't have any auto features when it comes to add/remove products based on their characteristics (e.g. type). Will this be a feature like collections?	This functionality will be supported through Flow. With it, you'll be able to add products to catalogs automatically using tags and metafields. This feature is not currently available, but is expected towards the end of 2023.
How do we segment and separate B2B orders from consumer orders for financial reporting? Today wholesale orders have a defined channel.	You can achieve this through the use of filters. All of our financial reports, as well as profit margin and customer reports, have a "B2B" filter. With it, you can filter for only DTC, only B2B, or both.
Will drop shipping be included in the feature set? Without it, B2B is missing an essential capability that our merchants use via the Wholesale Channel.	To support dropshipping on B2B on Shopify, you can enable the "allow shipping to any address" feature on a company location. When this setting is turned on, customers can change the address during checkout.
To be clear, the Plus Wholesale Channel that is currently available will be deprecated in Apr 2024?	Correct, the Plus Wholesale Channel will be deprecated in April 2024. We recommend migrating well in advance of this date to ensure everything is running smoothly beforehand.
Are discounts (automatic or with shopify scripts) applied on top of the pricelists allowed?	Discounts are currently turned off by default for B2B on Shopify. If you wish to use them, please reach out and we'll enable them for you. Keep in mind, automatic discounts are not supported on B2B just yet.

Will we be able to do multi-currency?	Yes, B2B on Shopify works seamlessly with Shopify Markets. With Catalogs, you can also set prices on the currency set up in your markets. That when, if your buyers switch their country, the prices are changes to what you indicated instead of being converted behind the scene.
Will this replace EDI?	No, this will not replace EDI, but one of the benefits of B2B on Shopify is that EDI apps in our third-party ecosystem are available for you to use.
Will customer order history be transferred when migrating from wholesale to B2B?	Yes, when you select customers to set up as companies, you'll have the option of transferring their past orders to the company. This will convert their DTC orders to B2B orders. Keep in mind, that once you've used the tooling to set up a company and migrate orders, any subsequent orders the customer places on the wholesale channel will not be associated with the new company you've set up.
Are you planning to support multipass? Seems like you don't currently, but is this on the roadmap? For us it's a crucial functionality.	We refer to multi-pass as 3rd party authorization, and we plan to support it by the end of 2023.
Are Vaulted Credit Cards only limited to Shop Pay or can we use this feature through 3rd party gateways?	Credit card vaulting is only available if you have Shopify Payments enabled on your shop. Adding additional gateways is something we plan to explore in the future.
Will manual payment be allowed for B2B customers?	Manual payment is not available in the same way as in DTC, however customers can choose the option of "select payment method later" if they are on payment terms, and the merchant can then collect payment outside of Shopify and mark the order as paid in the admin.
What is the best way to set case counts on our product pages? Variants?	Quantity rules on Catalogs is the best way to set case counts. You can set minimum and maximum quantities, and define what increment products must be ordered in. Quantity rules are applied at the variant-level.
Can different customers within one company have different products/pricing/quantity rules?	Products, pricing and quantity rules are all set through catalogs. Catalogs are assigned to company locations, not customers. If you wanted to have customer specific pricing, you could create a location for each customer and assign the bespoke catalog to the location.

Will company account requests work directly with company metafields for related licenses and documents?	Company account request is a new feature, coming to B2B on Shopify very soon. With it you'll be able to set up a form to capture interest from prospective B2B customers. Some information from the form (like company name) will be stored directly on the company record. But you can also set up custom form fields to capture any information specific to your business which will be stored using metafields on the company profile. Document uploads one option with this feature.
Does B2B support the Bundles Beta?	Bundles is a really exciting feature coming to Shopify, it will be available on B2B. To start, buyers will be able to add bundles to cart and checkout on any locations that are set to checkout to order. If the location is checking out to draft orders for review, bundles will not be able to be added to the cart.
Will digital products be compatible with B2B soon?	This is something on our roadmap that we're hoping to make available on B2B by the end of 2023.
Clarity on Mix and Match, can we offer Volume Discounts on Mixed SKU Ordering?	When volume pricing is released on B2B in the next couple of weeks, price breaks will be applied at the variant level. This means that mix & match/mixed SKU ordering will not be supported to start.
Can you expand on Sales Rep features coming vs. existing ability for sales to create draft orders and assign to customer?	Support for sales reps will allow you to grant staff permissions to reps to give them restricted access within the Shopify admin. Reps will only be able to view companies and locations they are assigned to. Reps will be able to create draft orders on behalf of the customer.
Will volume pricing be available to non-B2B customers as well?	At this time, volume pricing will only be available on B2B on Shopify. But if you're looking to offer volume pricing to your DTC customers, there are third-party apps that support this feature.
For a blended store, can we somehow make it so B2B customers can't use DTC discount codes?	Yes, this is possible using segmentation. You will first need to create a customer segment for your 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" to exclude B2B buyers and be saved as something like "All DTC" or another name that your team will intuitively recognize. Then when creating a discount code you can apply it to that DTC customer segment by selecting that segment under Customer Eligibility.
I have a dedicated store, but have a public facing informational site then a link to the expansion WH store. Will I need to add another store for B2B and link?	The approach here will depend on your current set up, and what works best for your business. If you already have a dedicated B2B store where the wholesale channel is installed, you can use the migration tooling to set up customers and companies. If you have a dedicated informational site that links to a different expansion store where the wholesale channel is set up you can do one of two things: 1. Move your existing data to the informational site store, where you

	<p>can set up B2B. Depending on the nature of your informational site, this option may not provide enough flexibility in terms of gating information.</p> <p>2. Set up B2B on Shopify on the expansion store where you currently have the wholesale channel set up. This won't require you to move data (you can simply use the migration tooling).</p>
If you migrate customers to companies can they still use the wholesale channel?	Yes, customers can continue to use the Plus wholesale channel after they've been added to a company on B2B on Shopify. That said, once customers have been migrated, any subsequent orders they place on the wholesale channel will appear as DTC orders. As a result, we don't recommend having customers using both.
Can you show a live store so we can see the customer experience?	You can view the B2B experience in the product demos in our resource hub.
Is there any way now to bulk update which catalog each client is on? To upload something to move a large group of clients from catalog A to catalog B?	Yes, you can add or remove catalogs from company locations in bulk from the Companies index, or by managing locations from the Catalogs page.
Can I copy a price list that has tiered pricing?	<p>Volume pricing for B2B on Shopify will be released in the next few weeks. With this new feature, you'll be able to set up price breaks based on the quantity of an item being ordered. For example, if you order 100 of a product, each item would be \$10 instead of \$12. Volume pricing is set at the variant level.</p> <p>Tiered pricing, where the first 50 products are \$12 and the next 50 are \$10 is not built into B2B on Shopify, but may be supported through our app ecosystem.</p>
Distributors can have 3-4 pricing levels depending on delivery terms plus there is wholesale direct. Can you handle multiple pricing levels (5-6)?	Catalogs will be able to support this type of pricing strategy. You can either set up different Catalogs for each pricing type (e.g. one catalog for wholesale direct) and then assign those catalogs to different locations.
can you start migration to B2B but not make the switch yet?	Yes, you can start setting up B2B on Shopify while continuing to receive orders on the Plus wholesale channel. We recommend that you start your B2B set up by making any storefront updates. When you're almost ready to switch over to B2B on Shopify, you can use the migration tooling to set up your customers as companies. Keep in mind, once you set up customers as companies and move their order history, any subsequent orders they make on the wholesale channel can't be migrated.
I am currently using the Wholesale Channel. Only some customer orders are attributed to the B2B Company. How do I retroactively import other	The current migration tooling allows you to bring over a customer's entire order history to the B2B company.

orders?	
Is B2B just for the Shopify Plus or also for accounts that are not on Shopify Plus?	B2B on Shopify is included as part of the Plus plan, and is exclusively available to Plus merchants.
Do our wholesale customers need new login information for the blended B2B & D2C store or can they use their same log in information?	B2B on Shopify operates on new customer accounts, which uses email and a one-time code sent to the customers email for login. Customers will not be able to login to B2B on Shopify using the password they used previously on the wholesale channel.
Catalogs - Adding products to catalogs have option to select collections / Products / Variants?	Out-of-the-box, adding products to Catalogs is done by selecting products. But towards the end of this year we're planning to add support for Catalogs in Flow. Through flow automation you will be able to add products to Catalogs based on the collection they are in.
Will these B2B features extend to POS?	POS support is a feature we plan to support in the future, however it isn't part of our 2023 roadmap.
Where's this new login page found? The details here are not clear.	B2B on Shopify uses new customer accounts. To set up new customer accounts, go to Settings. Under Customer accounts you'll see a section called "Accounts in online store and checkout." When new customer accounts are enabled, the version will say "new customer account."
Will we be able to create an approval form to screen potential new wholesale clients?	Yes, company account requests are a feature that will be released toward the end of the summer. With this feature you'll be able to add a custom sign up form to your online store to capture interest from prospective B2B customers. When the form is completed, a company will be created for you to review. Until you approve the company, it will not be able to login to your B2B store.
Can you do a demo for the transition from wholesale to B2B using a dedicated storefront.	Our help docs include tips for setting up B2B on Shopify on a different store than where you currently have the Plus wholesale channel set up.
Can buyers be locked to order location-specific permissions?	Yes, customers only have access to order for the company location's they're assigned to. When you add a customer to a company, you'll select which locations to add them to, and what level of permissions they should have.
How exactly does the product page look different for B2B customers when logged in, compared to B2C customers?	If you're operating a blended shop, by default the DTC and B2B product pages will look very similar. You can then customize the experience for B2B through the use of features like quantity rules and volume pricing and quick order lists. In addition to B2B features, in the next few weeks we'll be rolling out even more flexibility to customize your online store experience for B2B and DTC through the online store editor.

Telephone number at checkout is not available if you want to allow shipping to any address. Is this going to be added?	Great question, yes, we'll be adding phone numbers in these use cases to better enable dropshipping and other B2B use cases.
Can I import customers from a 3rd party order management system? We're a 20 year old business but launched shopify last year.	Yes, if you're looking to import customers as companies on B2B on Shopify we recommend Matrixify as an option.
I think you said that a company can only have 500 orders, what happens after this amount?	Companies can have unlimited orders. There is, however, a limit to the number of customers/contacts you can assign to them. Each company can have up to 500 customers.
Can the B2B store present in a specific language depending on the customer?	No, languages are not customer based. However, like DTC, you store can be displayed in different languages based on the market (e.g. country).
We have a D2C store on Shopify Plus and a wholesale store on Advanced Shopify so Can we just migrate our wholesale store from Advanced Shopify to B2B?	B2B on Shopify, like the Plus Wholesale Channel, is only available on Shopify Plus. If you're currently using the Plus Wholesale Channel on a store that is on the Advanced plan, we recommend reaching out to support for assistance with your individual set up.
For a Blended Store, are we able to change the style of the wholesale experience? We like that the Wholesale Channel is simple but also that inventory is synced	Yes, in the next couple of weeks we'll be releasing a new feature that will allow you to customize your online store experience based on business line. That means you'll be able to provide a unique buying experience for B2B and DTC, all from one store.
We currently use collections for pricing lists, how would you advise to change that since they won't be supported?	<p>The migration tooling will allow you to migrate wholesale channel price lists using collections to B2B on Shopify. The new catalog will be set up with any products that were in the collection at the time it was created. So if you add new products to that collection, you'll also need to add them to the catalog.</p> <p>Late this year we plan to introduce support for Flow and Catalogs, which will allow you to set up automations to automatically add/remove products to a catalog when they are added/removed from a collection.</p>
When creating a price list for B2B can you select specific variants or does the entire product get assigned?	Only products, not individual variants, can be included/excluded from Catalogs. So when you add a product to a Catalog, all of its variants will be included.
Will we be able to approve new companies and applications? IE We do not want to work with Amazon resellers	Yes, any companies created through the company account request feature will be not approved and will not be able to order. You'll be able to review the company and decide whether to delete it, or approve it by granting the customers permission to order.

Will there be a field at checkout for businesses to input PO#?	Yes, PO number is an optional field on the payment step of checkout for customers to complete.
If we haven't used Wholesale/B2B yet but want to soon should we wait until 2024?	B2B on Shopify is available to all merchants on the Plus plan today, so you can get started any time. The Plus Wholesale Channel will be deprecated in April 2024, and can no longer be installed on your store if you're not already using it.
Will there be a specific B2B Shopify Theme that would have the ability to adjust quantities easily on the PDP (similar to current Wholesale Channel PDP)?	We know how important easy ordering is for B2B buyers. While we don't currently have a B2B-specific theme it is on our roadmap, along with features like quick order forms. We'll also be releasing features in the next few weeks that will allow you to contextualize your online store experience just for your B2B customers while operating a blended set up.
Will we be able to keep our existing URL that we currently share to our wholesale customers?	This depends on the domain you are currently using. If you have a custom domain set up for Plus wholesale channel, you can change this at the DNS level to redirect to your B2B store. If you are using the default domain provided by the wholesale channel, you will not be able to automatically redirect it to B2B on Shopify.
Can vaulted credit cards be turned off if not wanted?	Credit card vaulting is always optional for buyers. However, if a buyer chooses to vault their card, they can. There's no way to turn off this feature
Will migration for customers into companies be easy?	Yes, our migration tooling makes it simple to take your existing Plus Wholesale Channel customers and set them up as B2B companies. When you're ready to migrate we recommend starting with a handful of customers to get familiar with the options in the migration tooling – and then you can easily migrate up to 250 customers at a time.
Will it be possible to do Category-level quantity rules?	Currently, quantity rules on Catalogs are set at the variant-level, and can be managed through CSV. Though very soon you'll be able to manage your quantity rules directly in the admin.
In the dedicated store can we use the same skus as our existing DTC store?	A dedicated store is a brand new shop. So, technically, yes, you could use the same SKU numbers. However, you would have to import your products into the dedicated store.
My wholesale customers are entered into Shopify with their Name. Is it possible to migrate customers to Company names instead of having to change the name later?	The tooling does use Customer Name as the default company name so the company name would need to be updated afterwards. One option would be using a tool like Matrixify to make a bulk update to company names.
How can I set up a B2B store within my organization if I haven't set up a wholesale channel?	Our help docs include step-by-step instructions for setting up B2B on Shopify for the first time, including setting up companies and price lists. B2B on Shopify is available to all merchants on the Plus plan.

Will it be possible to enable text message one-time login code?	To log in to new customer accounts, customers enter their email address and a one-time code. This offers a secure experience and means no more forgotten passwords. Currently the one-time code can only be sent to an email address, though SMS messages are something we're considering in the future.
Can you create and maintain price lists via the API (Rest or GraphQL)?	Yes, creating and maintaining price lists is supported in our latest admin graphql api. With it, you can add and remove products, manage prices, set quantity rules, and more.
If we launch a blended store, can we migrate to dedicated stores post launch?	Yes, you can certainly move from a blended store to a dedicated B2B store later, if you find that a blended store isn't the right setup for your business. That process would resemble the process to set up a new store; for example, moving data and setting up your storefront.
If using a blended storefront, will we still be able to manually invite new B2B accounts?	Yes, once you have set up a company and assigned customers through the admin, you'll see the option to send the B2B access email, which will invite customers to start buying from your B2B store.
Will the ability to set up a custom payment term be on the product roadmap?	Custom payment terms are not available or on our near-term roadmap, however you can always manually adjust the payment date on the order and select a fixed date.
All our offline B2B customers have dedicated account numbers so we'd need this info to create an account for a site but also on checkout to drafts, if possible?	You can collect additional information from customers at checkout using checkout extensions and metafields.
Will the one time code required for login happen every time, or is it only required when the user logs out?	The one-time code is not required for every session. Customers will be prompted intermittently to log in again to ensure account security.
If you use a blended store, how do you prevent your B2B customers from using DTC discount codes like a Welcome discount?	Currently, discounts are off by default for B2B, which prevents B2B customers from using DTC discount codes. If you plan to use discount codes for B2B, reach out and we can enable them for you.