

How to evaluate a Shopify B2B app

53 vendor-neutral questions for agencies and solution architects

How to run the evaluation

1. Answer from the documentation first. An app that has documented its data retention, its API version and its uninstall behaviour has thought about them; one that hasn't will answer from memory in a sales call.
2. Install on a development store. Development stores are free and B2B-capable, and app subscriptions on them are test charges, so every "does it actually" question below can be checked without the client's store. Set up two companies, three locations, two catalogs with an overlapping product, one location on Net 30 and one on draft-only checkout.
3. Put the remaining questions in writing and keep the answers with the project. The answer to "what is erased on uninstall" is part of the client's data-processing record, not a chat message. Once an app is chosen, the [50-test launch plan](#) is what to run before going live.

A. Native fit

The single most expensive mistake is an app that recreates something Shopify already owns. [What lives in Shopify and what belongs in the quote layer](#) is the reasoning; these are the questions.

QUESTION	WHY IT MATTERS	HOW TO VERIFY
Does it use Shopify Companies, company locations and company contacts as its customer model, or its own "accounts"?	Catalogs, payment terms, tax exemptions and checkout settings all hang off the Shopify location; a parallel account model duplicates every one of them	Create a company in Shopify admin and check the app shows it without re-entry; look for company and location IDs in the app's records or exports
Does it read the location's catalog price rather than keeping a price list?	A location can have several catalogs: a direct location catalog beats a market catalog, and among equals Shopify shows the lowest; volume pricing fixes a price and removes the catalog's percentage adjustment. A copy cannot know any of it	Give a test product two catalog prices for one location, then check the price the app starts from; ask whether pricing is resolved through <code>contextualPricing</code> at request time
Does an accepted quote become a native draft order for the company, with the buyer's location and contact on it?	A draft order created with a <code>purchasingEntity</code> picks up the location's terms and checkout settings; one created for the person does not	Convert a test quote and open the draft order in admin: company, location and contact should be on it, not just a customer

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Does the agreed price reach the draft order line, or does the app add a discount to fake it?	A negotiated unit price belongs in <code>priceOverride</code> on the line; a discount code changes reporting and can be removed	Convert a quote with a negotiated price and read the draft order: line price versus applied discounts
Does it apply the location's Shopify payment terms, or run its own?	Terms are collected by Shopify; an app's own "net terms" is a second receivables system	Check the converted draft order's payment terms against the location's setting
Does it work on Basic, Grow and Advanced, or does it check for Plus?	B2B has been on every plan since 2 April 2026; an app gating on the plan name rather than the capability is out of date	Install on a non-Plus development store with B2B enabled and try company-aware features
Does it offer deposits only where Shopify does?	Deposits are a Plus feature (<code>DraftOrderInput.deposit</code>); an app promising deposits on a Basic store is promising something Shopify cannot collect	Ask where the deposit is collected; the only correct answer is Shopify checkout on the draft order, and only on Plus
Is product eligibility - which products can be quoted, at what quantity - enforced on the server, or only hidden in the storefront?	A hidden button is not a rule; a buyer with a URL can submit anything	Submit a request for an excluded product by editing the form request in the browser's network tab; the server should reject it
Can a line that is not a variant - a custom size, a service, a setup charge - be added with its own price, tax flag and shipping flag, and does it reach the draft order as a custom line?	Real quotes have lines the catalog doesn't; a draft order supports custom lines with exactly those flags	Add one in a test proposal and convert; check the draft order line has no variant and carries the flags

B. Storefront

QUESTION	WHY IT MATTERS	HOW TO VERIFY
Is the storefront integration a theme app extension - app blocks in sections, app embed blocks for overlays - or code injected into the theme's files?	Extensions are added and removed by the merchant in the theme editor and leave nothing behind; injected code has to be cleaned out by hand and breaks on theme changes	In the theme editor, look under Apps in a section and under Theme settings > App embeds; then search the theme's Liquid files for the app's name
Is the app embed activated after install, and does the merchant know?	App embed blocks are "deactivated after an app is installed" and must be switched on in the theme editor; an app that reads as broken on day one is usually this	Install and check Theme settings > App embeds before touching anything
What does it load on every page, and how heavy is it?	Shopify's suggested limits for a theme app extension are 10 KB of compressed JavaScript and 100 KB of CSS; Built for Shopify requires that an app "must not reduce the storefront Lighthouse performance score by more than ten points"	Open a product page with the network tab filtered to the app's domain; run Lighthouse with the app's files blocked and unblocked, several rounds - the method, with a 42-run example
Does it survive a theme update or a switch to a new theme?	App blocks are placed per section, so a new theme starts without them; app embeds are switched on per theme in the theme editor. Anything injected into theme files does not come across at all	Duplicate the theme, publish the copy, and check what still works; then try a fresh theme
What happens on a headless storefront?	Theme app extensions are Liquid rendered by the Online Store; a Hydrogen or custom storefront renders none of them. Headless B2B works through the Storefront API contextualised with the buyer's token and <code>companyLocationId</code> , so the app needs an API or component path of its own	Ask for the headless integration guide; if the answer is "our app block", there isn't one
Does the request path work without JavaScript, and is it accessible?	A quote request is a form; a form that only exists in JavaScript fails for assistive technology and for a blocked script	Submit a request with JavaScript disabled; run an accessibility check on the form
If it hides prices, which layer?	A visual hide swaps the price element for a button and leaves the number in the page source, meta tags and structured data; a search-engine-safe hide keeps it out of the HTML a signed-out visitor receives, and that needs a one-time theme edit because an app cannot remove the theme's own markup	View source on a product page as a signed-out visitor and search for the price; ask how the app verifies the hide

C. Customer accounts and the buyer

QUESTION	WHY IT MATTERS	HOW TO VERIFY
Does it require the current customer accounts, and what does it do on a store that hasn't activated them?	Legacy customer accounts were deprecated on 26 February 2026 and never supported B2B; the buyer experience now lives in the current accounts or in a hosted page the app provides	Ask what a store without customer accounts activated gets; the honest answers are "a hosted portal" or "nothing"
Is the in-account experience a customer account UI extension?	Extensions run inside Shopify's account (order index, order status, profile, full page) under Shopify's login, with a 64 KB compressed bundle limit (128 KB for a full page); anything else is a link out	Sign in as a test buyer and see whether the app's page is inside the account or on another domain; the surfaces and their limits are in building a Shopify B2B portal on customer accounts
What does a guest get?	Native B2B shows prices only to a contact assigned to a location; buyers who ask before they have an account are the top of the funnel	Request a quote signed out; check how the buyer is reached and whether the quote attaches to a customer once one exists
Does it understand a buyer on several locations?	A contact with three locations chooses one before checkout; a quote has to belong to a location, not to the person	Give a test contact two locations and request quotes from each
Can the buyer see their quote and order history in one place?	Buyers re-order from history; an app that keeps history somewhere the buyer never goes is invisible	Check the buyer's account page after conversion for both the quote and the resulting order

D. Data, privacy and lifecycle

QUESTION	WHY IT MATTERS	HOW TO VERIFY
Which data does it store, and in which region?	Name, address, email and phone are protected customer data; where they sit is a contractual question for the client	Read the privacy policy and the sub-processor list; ask for the region
Has it been approved for protected customer data, and at which level?	Shopify reviews public apps before granting access; Level 2 (name, address, phone, email) requires encrypted backups, separated environments, access logging and an incident-response policy	Ask for the Partner Dashboard access status and the level; an app that doesn't know hasn't done it

QUESTION	WHY IT MATTERS	HOW TO VERIFY
What is the retention policy, and can the merchant change it?	Attachments and generated documents accumulate; a retention window is a data-protection control, not a storage cost	Read the retention docs; check whether files are deleted on a schedule
Can the merchant export everything?	The client will leave one day; quotes, versions and approvals should leave with them	Run the export on the dev store and open it
What is erased when <code>shop/redact</code> arrives, and when?	Shopify sends <code>shop/redact</code> 48 hours after uninstall and the app must erase the store's data; some apps keep a recovery window first	Ask for the exact behaviour and the window; it should match the docs
How does it handle <code>customers/redact</code> and <code>customers/data_request</code> ?	The redact webhook arrives 10 days after a deletion request, or once six months have passed since the customer's last order; the app has 30 days to act. Every App Store app must implement all three	Ask what is redacted on a customer erasure and what a data request returns
Are uploaded files validated?	A quote attachment is an upload from an unauthenticated buyer	Ask what is checked; type and active-content validation is the honest answer, and a claim of malware scanning should come with the name of the scanner
Is there a DPA and a sub-processor list?	The client's own privacy notice has to name them	Ask for both before the contract

E. API and reliability

QUESTION	WHY IT MATTERS	HOW TO VERIFY
GraphQL Admin API, or legacy REST?	The REST Admin API "is a legacy API as of October 1, 2024" and since 1 April 2025 new public apps must be GraphQL only; newer B2B fields ship in GraphQL first	Ask which API the app uses today, not which it plans to

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Which API version is it pinned to, and how does it upgrade?	Shopify releases a version every quarter and supports each for at least 12 months; an unsupported version "falls forward" silently. The app should name its version and its upgrade cadence	Ask for the current version; check it against Shopify's version table: on 7 October 2026 the stable versions are 2026-01, 2026-04, 2026-07 and 2026-10, and 2025-10 leaves support on 16 October 2026
How does it behave when throttled?	The Admin API allows 100 points per second on Standard, 200 on Advanced, 1,000 on Plus and 2,000 on Commerce Components, with a 1,000-point cap per query; when the bucket is empty the response is an HTTP 200 carrying a <code>THROTTLED</code> error code - Shopify's equivalent of a 429; a bulk operation that ignores <code>throttleStatus</code> fails the whole store's other apps too	Ask how bulk actions and syncs back off; look for <code>throttleStatus</code> -aware retry in the answer
Which webhooks does it depend on, and what happens when one is missed?	Shopify retries a failed delivery "8 times over the next 4 hours" and then deletes the subscription if it was created through the Admin API; delivery "isn't always guaranteed". Since API 2026-10 Shopify also offers Events, its successor to classic webhooks - ask which the app uses; both need the same reconciliation. An app that only learns about paid orders from <code>orders/create</code> will one day miss one	Ask whether there is a reconciliation job that periodically fetches from Shopify, as Shopify's own guidance recommends
Are webhook deliveries verified and de-duplicated?	HMAC verification and ignoring repeats by <code>X-Shopify-Webhook-Id</code> are the baseline; a duplicate <code>orders/create</code> handled twice can mark a quote paid twice	Ask directly; it is a yes/no with a header name in it
Is quote-to-order conversion idempotent?	A retried request or a second worker can create two draft orders for one acceptance; the fix is an idempotency key per conversion and a claim before <code>draftOrderCreate</code>	Trigger a conversion twice in quick succession on the dev store and count the draft orders
Is the admin UI embedded with the latest App Bridge and session tokens?	Shopify requires session tokens (now called ID tokens) for embedded apps and asks developers to "avoid third-party cookies or local storage"; Built for Shopify requires the latest App Bridge	Open the app in an incognito window with third-party cookies blocked
Which access scopes does it request, and why each?	App Store requirement 3.2 is to request only necessary scopes; <code>write_orders</code> and <code>read_all_orders</code> need a reason	Read the scope list on the install screen and ask for the reason per scope

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How does the client integrate with it? Shopify Flow triggers and actions, an API of its own, outbound webhooks - and what exactly does each expose?	The ERP and CRM questions are answered here; "we have Flow" means nothing without the list of triggers and their fields	Ask for the reference page listing every trigger, action and field; then check the three doors in ERP, CRM and PIM integration patterns - what the converted order carries, what Flow carries, what waits for an API
If it has checkout or customer-account extensions, what do they fetch, and how fast?	An extension that calls the app's backend adds that call to the buyer's wait; Built for Shopify's only checkout-speed number is for shipping apps' carrier-rate requests (p95 of 500 ms or less), so for anything else the vendor has to measure it themselves	Ask for the p95 of the extension's backend calls; it is measured, not estimated

(Corrected on 7 October 2026: this section previously said a throttled request gets a 429 - the GraphQL Admin API answers HTTP 200 with a `THROTTLED` error code instead - and applied Built for Shopify's 500 ms rule to all checkout requests, when it covers shipping apps' carrier-rate requests.)

F. Operations

QUESTION	WHY IT MATTERS	HOW TO VERIFY
Can a rep send a price that needs approval without getting it?	"Approval required" that is a reminder in the interface is not a control; the check has to run on the server in the send path so an automation cannot skip it either	Configure a policy on the dev store and try to send from a rep account; then try through any automation the app offers
Can a rep approve their own quote?	Segregation of duties is the first thing an auditor asks	Make the rep an approver and test
Are approver limits and escalation expressible?	"Up to 10 percent, then a manager" is the common policy	Configure it; if the app can't, that is the answer
Does the accept link stop working when the quote expires?	An expired proposal that can still be accepted is a pricing hole	Set a one-day expiry on the dev store and try the link the next day
Are proposals versioned and immutable once sent?	The document the buyer received is a commercial record; an app that edits a sent proposal in place cannot say what was agreed	Send, then try to edit; the app should force a new version or a counter

QUESTION	WHY IT MATTERS	HOW TO VERIFY
Is there an audit log with actor and timestamp for every state change?	"Who approved this price" a year later (what that record needs)	Perform five actions as two users and read the log
How do roles map to Shopify staff?	Shopify's sales-staff permissions scope which company records a rep sees; the app's roles decide what they may do to a quote; the two should compose, not conflict	Restrict a Shopify staff member to one location and check what the app shows them
What is on the documents?	PO number, terms, expiry, per-line prices, the version number; a signature block if the client needs one	Generate the PDF on the dev store and check the fields against the client's requirements
Can a buyer accept some lines and leave the rest open, and what does the order contain then?	Multi-line deals rarely close whole	Accept two of four lines in a test and read the draft order
What is the support model?	Hours, channel, response target, a status page, and whether the developer's emergency contact is current	Read the listing and ask

G. Commercial

QUESTION	WHY IT MATTERS	HOW TO VERIFY
Which features sit on which plan, and does the gating follow Shopify's capability or the plan name?	The client's plan and the app's plan are two different gates; both should be explicit	Read the pricing page; then check on a non-Plus B2B dev store
Is it Built for Shopify, and do you know what that proves?	The badge requires the storefront performance rule above, admin Web Vitals at p75 (LCP 2.5 s, CLS 0.1, INP 200 ms), a minimum of 50 net installs from active shops on paid plans, at least five reviews, and the latest App Bridge. It proves engineering hygiene and some adoption; it does not evaluate the B2B feature set	Check the badge on the listing; then run the rest of this list anyway
Can the whole build be proved on a development store before the client pays?	An agency build takes longer than a live-store trial	Ask whether the paid features run on a dev store

QUESTION	WHY IT MATTERS	HOW TO VERIFY
What do you get back when you leave?	Export format, whether draft orders and orders stay (they should - they are Shopify's), and what the app keeps	Run the export; read the uninstall doc

Where this came from

This worksheet is an extract of a longer guide. The full version - with the reasoning, the edge cases, and the Shopify setup - is on the QuotWay blog, and it's kept up to date.

The full guide www.quotway.com/blog/shopify-b2b-app-evaluation-checklist

QuotWay B2B quotes, negotiation, and approvals on Shopify - quotway.com

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