

Shopify B2B launch checklist

50 tests to run before going live, with expected results

Set up the fixture first

Every test below assumes this fixture on a development store (free, B2B-capable, and app subscriptions on it are test charges) or a duplicate of the client's store with the payment provider in test mode. Shopify's caution applies: "customers can't place live orders during the time that your payment providers are in test mode", so run this before launch or on the dev store, never on the live store after it.

- Two companies. Company A with three locations: A1 on Net 30, A2 set to "Only allow draft orders at checkout", A3 with a tax exemption and a tax ID. Company B with one location, B1, on no payment terms.
- Two catalogs. Catalog 1 assigned to A1, A2 and B1; Catalog 2 assigned to A1 only, containing one product that is also in Catalog 1 at a different price. On one product in Catalog 1: a minimum of 6, an increment of 6, and a volume break at 24.
- Contacts. One contact on A1 and A2 (two locations); one contact on A3 only; one contact on B1; one email address with no account at all (the guest).
- Staff. One admin; one sales rep with "Restrict permissions to assigned company locations" assigned to B1 only.
- Stock. One product tracked with 2 units on hand.
- Theme. The live theme plus a duplicate, unpublished, to test theme changes without touching the buyer's view.
- Payments. Shopify Payments test mode or the test gateway, so checkouts complete without money moving.
- If a quote layer is installed: a request-a-quote button live on product and cart, an approval policy that requires sign-off for any discount past 10 percent, and a one-day expiry on proposals.

A. Sign-in, accounts and context

#	TEST	EXPECTED RESULT	HOW TO RUN IT
1	B2B contact signs in	A one-time code arrives at the contact's email; no password is asked for; the account shows company and location information	Sign in as the A1 contact from a private window
2	Contact on two locations	The buyer is asked to choose a location before prices show; switching location changes the catalog	Sign in as the A1/A2 contact; pick A1, note a price, switch to A2, note the price
3	Signed-in customer with no company	Treated as a D2C customer: retail prices, no company information, no B2B checkout	Sign in with a customer that belongs to no location

#	TEST	EXPECTED RESULT	HOW TO RUN IT
4	Account request form	Submitting the form creates a company, a location and a customer in the admin, pending approval; the applicant sees nothing B2B until approved	Submit the form as the guest email; check Companies in admin; approve; sign in
5	Signed-out visitor	Sees exactly what the store intends: retail prices, or no prices if prices are hidden - and if the hide is meant to be search-engine-safe, no price in the page source either	View a product page signed out; view source and search for the price
6	Invitation email	The B2B invitation email arrives, is branded, and its link signs the contact in	Send the invitation from the company page; open it on a phone

B. Catalogs and pricing

When a row here fails, [why B2B buyers can't see their prices](#) maps the symptom to its cause.

#	TEST	EXPECTED RESULT	HOW TO RUN IT
7	Location price	A1 sees Catalog 1's price on a product that is only in Catalog 1; B1 sees the same catalog's price; a D2C customer sees the retail price	Compare the product page as each
8	Overlapping catalogs	On the product in both catalogs, A1 sees the lower of the two prices - both catalogs reach A1 the same way, and among equals Shopify shows the lowest. (On Plus, a catalog assigned directly to the location would instead beat one that reaches it through a market: "the most specific" wins before "the lowest")	View as A1; compare with the two catalog prices in admin
9	Quantity rules	Quantity below 6 or not a multiple of 6 is refused in the cart with a message; 6 and 12 are accepted	Add 5, then 7, then 6 as A1
10	Volume break	At 24 units the line price drops to the break price; at 23 it does not; the catalog's percentage adjustment no longer applies to that product	Add 23, then 24
11	Excluded product	A product not in the location's catalog cannot be added to the cart, including by URL or by editing the request in the browser	Try the product URL as B1; try adding via the cart's form with the variant ID
12	Catalog price change	Changing a price in Catalog 1 changes the storefront for A1 on the next page load; an existing draft order with a locked price does not change	Edit the catalog price; reload as A1; open the locked draft from test 23

#	TEST	EXPECTED RESULT	HOW TO RUN IT
13	Presentment currency	A buyer in a B2B market with its own currency sees prices in that currency, and the draft order and order are in it too	Assign Company B to a B2B market with a second currency; view as B1; check out

C. Checkout

#	TEST	EXPECTED RESULT	HOW TO RUN IT
14	Net terms checkout	A1's checkout shows the terms; the button reads "Submit"; the order is created with status "Payment pending"; nothing is charged	Check out as A1
15	Draft-only location	A2's checkout button reads "Submit for approval"; the order appears on the Drafts page, not Orders; the buyer sees it as pending	Check out as A2; open Drafts
16	No terms	B1 is asked for a card and clicks "Pay now"; the test payment succeeds; the order is paid	Check out as B1 with the test gateway
17	PO number	The PO number entered at checkout appears on the order and on the buyer's order status page	Enter a PO as A1; open the order in admin and in the account
18	Vaulted card	A card saved at the location level is offered on the next checkout without re-entry	Save a test card as B1; check out again
19	Deposit (Plus stores)	With a deposit on the location, the button reads "Submit now", the deposit is paid and the order shows "Partially paid" (or "Payment pending", depending on whether payment is captured automatically or manually); the balance follows the terms	Set a percentage deposit on A1; check out
20	Accelerated checkout	Shop Pay, Apple Pay, Google Pay and Amazon Pay buttons are not offered to a B2B buyer - they are incompatible with B2B checkout	Check out as A1 on a phone with a wallet configured
21	Reorder	The buyer can duplicate a past order from the account and reach checkout with the same lines at today's catalog prices	Reorder as A1 after test 14

D. Draft orders

When a draft-order row fails on price, [why a quote converts at the wrong price](#) maps the difference to its cause.

#	TEST	EXPECTED RESULT	HOW TO RUN IT
22	Admin draft for a location	A draft created in admin for A1 shows A1's catalog prices, payment terms and checkout settings without re-entry	Create a draft order, choose the A1 contact and location
23	Custom price and lock	A line's price can be overridden and locked; a later catalog change (test 12) leaves it unchanged	Override a line, lock prices, then run test 12
24	Reserve inventory	If the store reserves stock on drafts, reserving moves the units to Committed until the expiry; the 2-unit product cannot be bought by another buyer while reserved	Reserve on a draft with the 2-unit product; try to buy it as B1
25	Invoice	Sending the invoice emails the company contact; the link opens a checkout for the draft; paying it creates the order	Send invoice from the draft; pay with the test gateway
26	Draft becomes order	The completed draft appears on Orders with the PO number, terms and locked prices intact; the Drafts entry closes	Complete via invoice payment or "Mark as paid"

E. Tax and shipping

When a tax test fails, [why the tax on a quote doesn't match the order](#) traces which input Shopify read differently.

#	TEST	EXPECTED RESULT	HOW TO RUN IT
27	Exempt location	A3's checkout charges no tax on the exempt category; the tax ID (VAT number for a UK or EU address with Shopify Tax) is stored on the location	Check out as the A3 contact; compare with A1
28	Non-exempt location	A1 is taxed at the rate for the ship-to address; changing the shipping address changes the tax	Check out as A1 to two addresses
29	B2B shipping rates	The rates shown to B2B buyers are the ones intended for them (a B2B shipping profile, or the general rates), and a location with an editable shipping address can change it	Compare rates as A1 and as a D2C customer
30	One-time address	A location allowed a one-time shipping address can enter one at checkout; one that isn't cannot	Toggle the location setting; check out as A1

If you also sell to tax-exempt individuals, repeat test 27 with an exempt customer record instead of a location - [tax-exempt customers on Shopify](#) covers the customer settings, checkout and POS.

F. The quote layer

Skip this section if the store runs on catalogs and draft orders alone. If it uses a quote app or a custom build, every row applies; the [evaluation checklist](#) explains why each matters.

#	TEST	EXPECTED RESULT	HOW TO RUN IT
31	Request from a product page	A signed-in buyer's request arrives with the product, variant, quantity and the buyer's company and location; the buyer gets a confirmation email that lands in the inbox, not spam	Request as A1; check the request and the email headers
32	Request from the cart	A multi-line cart becomes one request with all lines	Fill a cart as A1; request a quote
33	Guest request	The guest email can request a quote without an account, reach the proposal through the app's own link or code, and - after creating an account - see the quote in it	Request as the guest; sign up later with the same email
34	Eligibility enforced	A product excluded from quoting is rejected by the server, not merely hidden	Replay the request from the browser's network tab with an excluded variant ID
35	Baseline price	The proposal for A1 starts from A1's catalog price (the lower one on the overlapping product), not the retail price and not a price stored in the app	Compare the proposal's starting price with test 8
36	Custom line	A line that is not a variant can be added with its own price, tax flag and shipping flag, and reaches the draft order as a custom line with those flags	Add a setup charge; convert; read the draft order line
37	Versions are immutable	Sending a proposal fixes it: a sent proposal can't be edited; a buyer counter produces its own version, your reply produces the next one, and earlier versions stay on record	Send, then try to edit; counter as the buyer, then reply; read the history
38	Approval enforced	A rep sending a discount past 10 percent cannot: the send is blocked until an approver acts, including when the send comes from an automation; the rep cannot approve their own quote	Send as the rep; try any auto-send; try approving as the rep
39	Expiry	After the one-day expiry the accept link no longer accepts; the buyer sees that the quote has expired	Set the expiry; wait or set the clock; open the link

#	TEST	EXPECTED RESULT	HOW TO RUN IT
40	Accept some lines	The buyer accepts two of four lines; the other two stay open, not declined; the draft order holds only the two accepted lines at their negotiated prices, with A1's payment terms and the PO number	Accept two lines as A1; open the draft order

G. Staff and permissions

#	TEST	EXPECTED RESULT	HOW TO RUN IT
41	Restricted rep	The rep assigned to B1 sees only B1's company, customers, orders and draft orders in admin, and nothing of Company A	Sign in as the rep; open Companies, Customers, Orders, Drafts
42	Rep and the quote layer	The rep's view in the quote layer matches the Shopify restriction, or is more restrictive, never less	Open the quote list as the rep
43	Staff limits	An eleventh sales staff member cannot be assigned to a location - the limit is 10 per location - and one staff member can be on several locations	Add staff to B1 until the limit; assign one of them to A1 as well

H. Storefront and theme

#	TEST	EXPECTED RESULT	HOW TO RUN IT
44	App embed active	The quote button (or any app's storefront element) appears after install only once its app embed is switched on in Theme settings > App embeds; the switch is on in the live theme	Check the theme editor; view the product page
45	Theme update	Publishing the duplicate theme keeps every app embed and block working; nothing was injected into theme files that the duplicate lost	Publish the duplicate; run tests 5, 31 and 44 again; switch back
46	Mobile and no JavaScript	The request form works at 390 px wide, and submits with JavaScript disabled	Use a phone and a browser with scripts blocked
47	Performance	The storefront's Lighthouse performance score with the app embed on is within 10 points of the score with it off - the Built for Shopify rule	Run Lighthouse mobile on home, product and collection with the app's files blocked and unblocked, at least five interleaved rounds, weighted 17/40/43 - a single pair is within run-to-run noise (method)

I. Integrations, resilience and data

#	TEST	EXPECTED RESULT	HOW TO RUN IT
48	Flow	The B2B trigger or the quote layer's trigger fires on the event and the Flow action runs (a tag, an email, a Slack message)	Build a one-step Flow; cause the event
49	Missed webhook and double conversion	With the app's webhook endpoint returning an error, Shopify retries (8 times over 4 hours) and the app reconciles when it recovers; converting the same acceptance twice in quick succession produces one draft order, not two	Break the endpoint briefly on the dev store; trigger a conversion twice
50	Uninstall and export	Export from the quote layer contains every quote, version, approval and message; uninstalling leaves products, companies, catalogs, draft orders and orders untouched; reinstalling within the documented window restores the app's data	Export; uninstall; check the admin; reinstall

Before launch

- Switch the payment provider out of test mode, and delete or archive the test companies, test orders and test draft orders.
- If prices are hidden from search engines, run the leak check signed out one last time after the final theme publish.
- Keep the fixture. The plan is re-run after every theme update, every Shopify API version the quote layer upgrades to, and every Shopify Edition that touches B2B; the [reference page](#) logs those.

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-launch-test-plan

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

Plans Free Lite plan, no card - quotway.com/pricing

Built by EFOLI. Copy, adapt, and share this internally - it's meant to be used.