

The B2B Search Readiness Checklist

One afternoon. Every company you sell to. One honest answer: is this buyer scoped to their catalog, or are they searching the retail store?

When you turn on Shopify B2B, the companies, catalogs, and price lists come with it. Whether search actually uses them is a separate decision. A B2B catalog is not a retail catalog with a wholesale price column; each company location has its own products, collections, and price list.

This sheet finds the buyers still searching the retail store under a B2B login. For each company context, run five checks and mark pass or fail. Every fail is a buyer who is mis-scoped.

How to run it

1. Pick the company contexts you sell into. One row per company location. Sign in as that buyer, or pass that company's `companyLocationId` on the request.
 2. For each company, run the five checks below against your live storefront.
 3. Mark each cell P (pass) or F (fail). Write a quick note where it helps.
 4. Count the fails per company. Any company with two or more fails is searching the wrong catalog.
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The five checks

- **Scoped catalog.** Does search return only the products in this company's catalog? Run three queries that should hit catalog-only products, and confirm no out-of-catalog or retail-only products appear.
 - **Scoped collections.** Are collections excluded from this catalog correctly hidden? Request one out-of-catalog collection directly and confirm it returns a 404 or is hidden, not the retail version.
 - **Scoped price list.** Does the buyer see their negotiated price-list price, not retail? Pull three best-sellers and confirm the price matches the company's price list. This is the check that saves orders.
 - **Part-number findability.** Does a raw SKU or part number return the part, not a wall of near-matches? Run five real part numbers from your catalog and confirm the exact item ranks first.
 - **Agent-readability.** Does a programmatic request carrying this company's `companyLocationId` get the scoped catalog and price list, and does a request with an unknown company location return zero results (fail closed) rather than the retail catalog?
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Your per-company grid

Swap the example companies for your own. Add rows as needed.

Company context	Scoped catalog	Scoped collections	Scoped price list	Part-number findability	Agent-readability	Fails
Acme Industrial (loc. 1)	☐	☐	☐	☐	☐	—
Acme Industrial (loc. 2)	☐	☐	☐	☐	☐	—
Northwind Supply	☐	☐	☐	☐	☐	—
Retail (no company)	☐	☐	☐	☐	☐	—
_____	☐	☐	☐	☐	☐	—
_____	☐	☐	☐	☐	☐	—

Total fail cells across all companies: ____

What each fail means, and where to fix it

- **Scoped catalog fail.** Retail or out-of-catalog products are showing for a company buyer. Confirm the request carries `identity.companyLocationId` (it is not auto-resolved from the customer ID, so the storefront has to pass it), and confirm the catalog synced.
 - **Scoped collections fail.** An out-of-catalog collection still resolves. Confirm the catalog's collection inclusion/exclusion synced; excluded collections should 404 for that company.
 - **Scoped price list fail.** The buyer sees retail pricing. Confirm the catalog has a price list assigned and that pricing resolves in the right order: catalog price list first, then market pricing, then the default variant price.
 - **Part-number findability fail.** A SKU or part number buries the exact item. Confirm SKU lookups are recognized and give your SKU, manufacturer part number, and key spec attributes keyword weight so they carry findability. There is no single magic part-number field; you configure which attributes count.
 - **Agent-readability fail.** A programmatic request gets retail results, or an unknown company returns the retail catalog instead of zero results. The same identity discipline applies to agents: the caller must pass `companyLocationId`, and unknown companies should fail closed.
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Read your score

- **0 fails across all companies:** rare and good. Re-run after your next price-list change or new company onboarding.
- **1 to 3 fails:** specific, fixable gaps. Work them company by company in the order above.
- **4 or more fails, or any company failing 3+ checks:** that buyer is searching the retail store under a B2B login. They are likely seeing the wrong products and the wrong prices, and that is where B2B

orders quietly leak.

One honest boundary

This sheet checks what identity-scoped search actually controls: catalog scoping, collection scoping, price-list pricing, part-number findability, and fail-closed behavior.

It does not test quote-level or contract-pricing display, net-terms-aware merchandising, or a native per-company merchandising rule, because those are not search features. Company-specific merchandising on top of catalog scoping bridges through customer tags, not a company switch.

If a vendor tells you their search "shows each customer's contract price and re-ranks by payment terms," ask them to show you the field, because that is not a documented search capability.

Want us to run this live on your catalog?

We'll take your company contexts, run the same five checks live against your real catalog, and show you company by company what each buyer actually gets. 30 minutes, your companies, your products.

[Book a demo →](#)

Built by the Layers team. Enterprise search and merchandising for Shopify Plus. Last updated July 2026.
