BigCommerce Buyer Portal Migration: The Checklist at a Glance

By Samad Salman · Last verified against BigCommerce documentation: Oct 31, 2026

Moving from the legacy B2B experience to the Buyer Portal takes 11 steps in BigCommerce's self-service tool. Enabling it takes effect immediately.

Most problems come from leftover theme code, custom checkout and integrations. This overview covers what leadership needs to settle, plan and sign off. The full checklist has every step in detail.

BEFORE YOU START

Five things to settle first

- [ ] **Apply for the Buyer Portal** through the B2B Edition application form. Setup can take up to a week.
- [ ] **Use an Owner or Admin account.** Only these roles can see the self-service tool.
- [ ] **Request the B2C order history sync** by emailing BigCommerce, if B2C customers need past orders. B2B orders sync automatically.
- [ ] **List every legacy customization** and sort it with the Buyer Portal Customization Triage.
- [ ] **Decide on Independent Companies.** It can't be reverted once enabled.

THE 11 STEPS

The migration in four phases

PHASE 1 · BEFORE STEP 1
Prepare

- Settle the five items above
- Pick who runs it
- Agree a target go-live date

PHASE 2 · STEPS 1–8
Clean up and test

- Test in a sandbox
- Remove legacy theme code
- Turn off Wish Lists
- Check account links and product page buttons
- Test checkout as a Company buyer
- Configure settings and test workflows for every buyer role

PHASE 3 · STEPS 9–10
Go live

- Sync orders
- Enable the Buyer Portal in the lowest-traffic window
- Apply the theme and retest on the live store

PHASE 4 · STEP 11
Close out

- Wait until the store is stable and buyers have ordered
- Click "Migration complete", which removes the one-click rollback

DECISIONS

Three decisions only leadership can make

PERMANENT

Independent Companies

Enable it or not. It can't be rolled back, so treat it as permanent.

SCHEDULE

The go-live window

Enabling takes effect immediately. Pick your lowest-traffic window and tell key buyers and sales reps.

RESOURCING

Who runs it

Your team or a partner. Theme code, checkout and integrations need developer time either way.

WHERE IT GOES WRONG

The four biggest risks

Leftover theme code	Legacy B2BConfig code or B2B scripts conflict with the Buyer Portal.
Custom checkout	A checkout on old source code breaks payment methods, POs or address rules.
Integrations and ERP	A sandbox without your integrations passes tests that production fails.
Closing out too early	Clicking "Migration complete" removes your one-click rollback.

How to roll back

In the self-service tool, click **"Disable the Buyer Portal"**, then reapply your legacy theme. You can enable the Buyer Portal again at any time. If you've already dismissed the tool, open a BigCommerce support case to get it back.

Independent Companies can't be rolled back. Treat that setting as permanent.

GO-LIVE DAY

Go-live day plan

- [ ] Order sync scheduled for migration day
- [ ] Test accounts ready for each buyer role
- [ ] Low-traffic window agreed; key buyers and sales reps told
- [ ] Checkout, quotes, Shopping Lists and invoices retested on production
- [ ] Legacy theme kept, unpublished, for rollback
- [ ] ERP and supply-chain order flow checked with a real test order

WANT THIS DONE FOR YOU?

Book a free readiness assessment

We'll review your store and run all 11 steps for you.

Contact Us