



SOFTWARESILOS

B2B Quote Documentation

PDF Manual

MODULE

b2b-quote

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B2B Quote Documentation

B2B Quote Documentation · /b2b-quote

Enterprise-grade quote management system for Magento 2 B2B commerce.

Overview

The B2B Quote extension enables customers to request quotes, negotiate prices, and convert approved quotes directly into orders.

Key Capabilities

Feature	Description
Quote Lifecycle	Draft → Submit → Review → Approve → Accept → Order
Price Negotiation	Customer counter offers, admin pricing
Messaging	Built-in communication
Attachments	File sharing (specs, contracts)
Pricing Rules	Automated discount calculations
Workflow Rules	Event-driven automation
REST API	Complete API for integrations

Quick Start

1. [Install the extension](#)
2. [Configure settings](#)
3. [Set up quote statuses](#)
4. Customers can now request quotes

Documentation Sections

Getting Started

- [Installation Guide](#)
- [Configuration](#)
- [Settings Reference](#)
- [Admin Permissions \(ACL\)](#)
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Features

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Administration

- [Analytics Dashboard](#)
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Reference

- [REST API](#)
- [Add-Ons](#)
- [Troubleshooting](#)

Database Tables

The extension creates these tables:

Table	Purpose
b2b_quote	Main quote records
b2b_quote_item	Quote line items
b2b_quote_status	Configurable statuses
b2b_quote_project	Customer projects
b2b_quote_message	Communication
b2b_quote_attachment	File attachments
b2b_quote_pricing_rule	Pricing automation
b2b_quote_workflow_rule	Workflow automation

Requirements

- Magento 2.4.6 - 2.4.8
- PHP 8.1 - 8.5

Installation Guide

B2B Quote Documentation · [/b2b-quote/getting-started/installation](#)

Install the B2B Quote extension on your Magento 2 store.

Requirements

- Magento 2.4.x
- PHP 8.1+
- Composer

Installation via Composer

```
composer config bearer.repo.softwaresilo.io <token>
composer config repositories.softwaresilo composer
https://repo.softwaresilo.io/
composer require mageb2b/b2b-quote:*
```

Enable the Module

```
php bin/magento module:enable MageB2B_B2BQuote
php bin/magento setup:upgrade
php bin/magento setup:di:compile
php bin/magento cache:flush
```

Verify Installation

Check that the module is installed:

```
php bin/magento module:status MageB2B_B2BQuote
```

Database Tables

The installation creates these tables:

Table	Purpose
b2b_quote	Main quote records
b2b_quote_item	Quote line items
b2b_quote_status	Configurable statuses
b2b_quote_project	Customer projects
b2b_quote_message	Communication
b2b_quote_attachment	File attachments
b2b_quote_pricing_rule	Pricing automation

Table	Purpose
b2b_quote_workflow_rule	Workflow automation

Post-Installation

1. Configure quote settings
2. Set up quote statuses
3. Configure status transitions
4. Configure pricing rules (optional)
5. Set up workflow automation (optional)
6. Configure PDF layout and company data (optional)
7. Configure guest quotes (optional)

Next Steps

- [Configuration Guide](#)
- [Quote Management](#)

Configuration

B2B Quote Documentation · [/b2b-quote/getting-started/configuration](#)

Configure the B2B Quote extension for your business requirements.

Where Settings Live

All settings are under:

- **Stores > Configuration > MageB2B > B2B Quote**

The underlying config paths are grouped like:

- `b2bquote/general/*` (core settings)
- `b2bquote/frontend_settings/*` (customer-facing behavior)
- `b2bquote/email_notifications/*` (templates and recipients)
- `b2bquote/attachments/*` (uploads)
- `b2bquote/pdf/*` (PDF layout and company data)
- `b2bquote/guest_quote/*` (guest quotes)
- `b2bquote/pricing/*` (negotiation)
- `b2bquote/pricing_rules/*` (auto pricing)
- `b2bquote/workflow/*` (automation)
- `b2bquote/quote_merge_split/*` (merge/split)
- `b2bquote/revision/*` (revision tracking)
- `b2bquote/shipping/*` (shipping)
- `b2bquote/inventory/*` (inventory reservation)
- `b2bquote/quote_fee/*` (fees)
- `b2bquote/payment/*` (payment restrictions for quote checkout)
- `b2bquote/customer_experience/*` (UX defaults)
- `b2bquote/order_creation/*` (order creation safeguards)

For a detailed list of settings and what they do, see:

- [Settings Reference](#)

Screenshot placeholder: configuration overview section

File: `./_screenshots/config-general.png`

Recommended First Setup

1. Enable the module: `b2bquote/general/enable`
2. Set quote number format: `b2bquote/general/quote_number_format`
3. Configure statuses and transitions:
 - [Status Configuration](#)
 - [Status Transitions](#)
4. Configure frontend:
 - `b2bquote/frontend_settings/display_on_product`
 - `b2bquote/frontend_settings/enable_cart_conversion`
5. Configure email notifications:

- [Email Notifications](#)
- 6. Configure PDF layout/branding (optional):
 - [PDF Export & Layouts](#)
- 7. Enable guest quotes (optional):
 - [Guest Quotes](#)

Related

- [Installation Guide](#)
- [Settings Reference](#)
- [Admin Permissions \(ACL\)](#)
- [Cron Jobs](#)
- [Quote Management](#)
- [Pricing Rules](#)
- [Add-Ons](#)

Cron Jobs

B2B Quote Documentation · [/b2b-quote/getting-started/cron-jobs](#)

B2B Quote relies on Magento cron for expiration handling, reminders, and cleanup.

Scheduled Jobs

Job Name	Schedule	Purpose
b2bquote_quote_check_expired	0 2 * * *	Mark quotes as expired when past validity
b2bquote_send_expiration_reminders	0 * * * *	Send reminder emails based on configured intervals
b2bquote_delete_old_drafts	0 3 * * *	Delete old draft quotes (if configured)
b2bquote_cleanup_old_revisions	0 4 * * *	Remove old revisions (if enabled)

What To Check When “Automation Doesn’t Work”

1. Magento cron is running on the server
2. Email settings and templates are configured
3. Relevant features are enabled in config:
 - `b2bquote/email_notifications/*`
 - `b2bquote/revision/cleanup_enabled`
 - `b2bquote/customer_experience/draft_lifetime_days`

See:

- [Troubleshooting](#)

Admin Permissions (ACL)

B2B Quote Documentation · /b2b-quote/getting-started/permissions

B2B Quote adds granular admin permissions so you can give sales/support users access without full admin rights.

Where To Configure Roles

In Magento Admin go to:

- **System > Permissions > User Roles** (create/edit a role)
- **System > Extensions > Integrations** (if you use integration tokens)

The permissions below show up under **B2B Quotes** in the role resource tree.

Admin Menu (What Maps To What)

Admin Menu	Required ACL
B2B Quotes > Analytics Dashboard	MageB2B_B2BQuote::dashboard (granular: dashboard_view, dashboard_export)
B2B Quotes > Quotes	MageB2B_B2BQuote::quotes_manage (often combined with quotes_view/quotes_save)
B2B Quotes > Projects	MageB2B_B2BQuote::projects
B2B Quotes > Quote Statuses	MageB2B_B2BQuote::statuses
B2B Quotes > Status Transitions	MageB2B_B2BQuote::transitions
B2B Quotes > Quote Categories	MageB2B_B2BQuote::categories
B2B Quotes > Quote Tags	MageB2B_B2BQuote::tags
B2B Quotes > Quote Fees	MageB2B_B2BQuote::quote_fees
B2B Quotes > Pricing Rules	MageB2B_B2BQuote::rules_pricing
B2B Quotes > Workflow Rules	MageB2B_B2BQuote::rules_workflow
B2B Quotes > Configuration	MageB2B_B2BQuote::config

Main ACL Resources

Permission	What It Controls
MageB2B_B2BQuote::dashboard_view	View analytics dashboard
MageB2B_B2BQuote::dashboard_export	Export dashboard data
MageB2B_B2BQuote::quotes_manage	Access quote management UI

Permission	What It Controls
MageB2B_B2BQuote::quotes_view	View quotes
MageB2B_B2BQuote::quotes_save	Save/update quotes
MageB2B_B2BQuote::quotes_delete	Delete quotes
MageB2B_B2BQuote::messages	Manage quote messages
MageB2B_B2BQuote::attachments_view	View/download attachments
MageB2B_B2BQuote::attachments_upload	Upload attachments
MageB2B_B2BQuote::attachments_delete	Delete attachments
MageB2B_B2BQuote::quotes_merge	Merge quotes
MageB2B_B2BQuote::quotes_split	Split quotes
MageB2B_B2BQuote::projects	Projects
MageB2B_B2BQuote::statuses	Statuses
MageB2B_B2BQuote::transitions	Status transitions
MageB2B_B2BQuote::categories	Categories
MageB2B_B2BQuote::tags	Tags
MageB2B_B2BQuote::quote_fees	Quote fees
MageB2B_B2BQuote::rules_pricing	Pricing rules
MageB2B_B2BQuote::rules_workflow	Workflow rules
MageB2B_B2BQuote::config	System configuration section

Tip: Align ACL With REST API Access

If you use the **REST API Add-On** (package `mageb2b/b2b-quote-api`), admin/integration endpoints are protected by the same ACL resources. Keep your integration user's permissions minimal:

- Prefer `MageB2B_B2BQuote::quotes_view` for read-only integrations
- Add `MageB2B_B2BQuote::quotes_save` only when the integration needs to update quotes

See:

- [REST API Add-On \(installation\)](#)
- [REST API](#)

Settings Reference

B2B Quote Documentation · /b2b-quote/getting-started/settings-reference

All settings are under **Stores → Configuration → MageB2B → B2B Quote** (config path prefix: `b2bquote/*`).

This page focuses on what each group controls and which settings usually matter in real projects.

Screenshot placeholder: configuration overview
File: `./_screenshots/config-general.png`

General (b2bquote/general/*)

Path	What It Does
<code>b2bquote/general/enable</code>	Master switch for the module
<code>b2bquote/general/quote_number_format</code>	Quote numbering format (supports {increment_id:N} padding)
<code>b2bquote/general/default_status</code>	Status for new quotes
<code>b2bquote/general/default_expiration_days</code>	Default validity period
<code>b2bquote/general/accept_mode</code>	How acceptance works (e.g. “checkout” vs “instant”)
<code>b2bquote/general/allow_quote_accept_mode_choice</code>	Let customers choose accept mode
<code>b2bquote/general/max_quote_items</code>	Max items per quote (0 = unlimited)
<code>b2bquote/general/max_item_qty</code>	Max quantity per item (0 = unlimited)
<code>b2bquote/general/allowed_customer_groups</code>	Which customer groups can create quotes
<code>b2bquote/general/auto_approval_enabled</code>	Auto-approve under threshold
<code>b2bquote/general/auto_approval_threshold</code>	Threshold amount
<code>b2bquote/general/clear_cart_after_conversion</code>	Clear cart after converting cart → quote

Guest Quotes (b2bquote/guest_quote/*)

Path	What It Does
<code>b2bquote/guest_quote/enabled</code>	Allow guest quote requests
<code>b2bquote/guest_quote/quote_number_format</code>	Guest quote numbering format
<code>b2bquote/guest_quote/access_token_pattern</code>	Regex pattern for generated access tokens

See:

- [Guest Quotes](#)

PDF (b2bquote/pdf/*)

Path	What It Does
b2bquote/pdf/pdf_layout	Select PDF layout (visual selector)
b2bquote/pdf/pdf_logo_path	Company logo (stored under pub/media/b2bquote/pdf/)
b2bquote/pdf/pdf_company_name	Company name in header
b2bquote/pdf/pdf_company_address	Company address in header
b2bquote/pdf/pdf_company_phone	Company phone in header
b2bquote/pdf/pdf_company_email	Company email in header
b2bquote/pdf/pdf_footer_text	Footer text on all pages
b2bquote/pdf/pdf_download_restricted_statuses	Block PDF download for selected statuses
b2bquote/pdf/pdf_display_item_notes	Show item notes in PDFs

See:

- [PDF Export & Layouts](#)
- [PDF Designer Add-On](#)

Frontend Settings (b2bquote/frontend_settings/*)

Path	What It Does
b2bquote/frontend_settings/button_text	“Add to Quote” button label
b2bquote/frontend_settings/display_on_product	Show on product detail page
b2bquote/frontend_settings/display_on_category	Show on category listing
b2bquote/frontend_settings/show_in_topnav	Show quotes link in top nav
b2bquote/frontend_settings/enable_mini_quote	Enable mini quote dropdown
b2bquote/frontend_settings/mini_quote_max_display	Max quotes shown
b2bquote/frontend_settings/mini_quote_display_mode	Which quotes appear in mini quote
b2bquote/frontend_settings/allow_counter_offer	Allow customer counter offers
b2bquote/frontend_settings/show_prices	Show prices in frontend quote UI
b2bquote/frontend_settings/quote_list_page_size	Quotes per page
b2bquote/frontend_settings/redirect_after_product_add	Redirect to quote after adding product

Path	What It Does
b2bquote/frontend_settings/enable_cart_conversion	Enable cart → quote
b2bquote/frontend_settings/cart_conversion_min_amount	Minimum cart subtotal
b2bquote/frontend_settings/cart_conversion_button_text	CTA text in cart
b2bquote/frontend_settings/show_history_tab	Show history tab on quote view
b2bquote/frontend_settings/allow_duplicate_quote	Allow quote duplication

See:

- [Frontend Experience](#)

Email Notifications (b2bquote/email_notifications/*)

Key fields:

- email_sender
- admin_recipients
- template_* (submitted, counter offer, status changed, expired, negotiated, message, reminder)
- expiration_reminder_intervals
- attach_quote_pdf
- attach_customer_files

See:

- [Email Notifications](#)

Pricing / Negotiation (b2bquote/pricing/*)

Path	What It Does
b2bquote/pricing/negotiation_enabled	Enable negotiation logic (counter offers, etc.)

Quote Fees (b2bquote/quote_fee/*)

Path	What It Does
b2bquote/quote_fee/apply_tax	Apply tax to fees
b2bquote/quote_fee/fee_includes_tax	Fee amounts include tax (extract vs add)
b2bquote/quote_fee/tax_class_id	Tax class for fees

Shipping (b2bquote/shipping/*)

Path	What It Does
b2bquote/shipping/required	Require shipping address and method
b2bquote/shipping/free_shipping_threshold	Free shipping threshold
b2bquote/shipping/disallowed_methods	Hide shipping methods for quotes

Payment (b2bquote/payment/*)

Path	What It Does
b2bquote/payment/required	Require payment method selection for quotes
b2bquote/payment/disallowed_methods	Hide payment methods for quotes

Attachments (b2bquote/attachments/*)

Path	What It Does
b2bquote/attachments/allowed_extensions	Allowed extensions (comma-separated)
b2bquote/attachments/max_filesize_mb	Max upload size (MB)
b2bquote/attachments/disabled_statuses	Disable/hide attachments by status

Messaging (b2bquote/messaging/*)

Path	What It Does
b2bquote/messaging/max_message_length	Max chars (0 = unlimited)
b2bquote/messaging/messaging_disabled_statuses	Disable messaging by status

Inventory Reservation (b2bquote/inventory/*)

Path	What It Does
b2bquote/inventory/reserve_on_approval	Reserve stock when approved
b2bquote/inventory/reservation_compensation_code	Reservation identifier
b2bquote/inventory/release_on_expiration	Release on expiration
b2bquote/inventory/release_on_rejection	Release on rejection

Pricing Rules (b2bquote/pricing_rules/*)

Path	What It Does
b2bquote/pricing_rules/pricing_rules_enabled	Enable pricing rules engine
b2bquote/pricing_rules/can_stack_rules	Allow stacking vs first match

Merge & Split (b2bquote/quote_merge_split/*)

Path	What It Does
b2bquote/quote_merge_split/merge_enabled	Customer can merge quotes
b2bquote/quote_merge_split/split_enabled	Customer can split quotes
b2bquote/quote_merge_split/merge_messages_default	Default for including messages

Path	What It Does
b2bquote/quote_merge_split/merge_attachments_default	Default for including attachments
b2bquote/quote_merge_split/delete_source_after_merge	Delete sources after merge

Workflow (b2bquote/workflow/*)

Path	What It Does
b2bquote/workflow/workflow_enabled	Enable workflow rules
b2bquote/workflow/transition_validation	Whether workflow status actions must follow transitions

Revision Tracking (b2bquote/revision/*)

Path	What It Does
b2bquote/revision/enabled_events	Which events create revisions
b2bquote/revision/cleanup_enabled	Enable cleanup via cron
b2bquote/revision/cleanup_days	Retention days (0 = keep forever)

Customer Experience (b2bquote/customer_experience/*)

Path	What It Does
b2bquote/customer_experience/use_customer_addressbook	Allow copying from address book (quotes store addresses separately)
b2bquote/customer_experience/draft_lifetime_days	Auto-delete drafts after N days
b2bquote/customer_experience/typical_response_time_days	Shown as guidance text
b2bquote/customer_experience/approval_validity_days	Expire approved quotes after N days

Order Creation (b2bquote/order_creation/*)

Path	What It Does
b2bquote/order_creation/price_change_behavior	What to do if catalog price changed
b2bquote/order_creation/stock_validation_behavior	What to do if items out of stock
b2bquote/order_creation/product_availability_check	Validate enabled/not deleted

Analytics Dashboard

B2B Quote Documentation · /b2b-quote/features/analytics-dashboard

The admin area includes dashboards for quote KPIs and visualizations (funnels, timelines, expiring quotes, customer/product insights).

Screenshot placeholder: analytics dashboard overview

File: `./_screenshots/admin-analytics-dashboard.png`

Attachments

B2B Quote Documentation · /b2b-quote/features/attachments

Attachments allow customers and admins to share files directly on a quote (specs, drawings, contracts, requirements, etc.).

Typical Attachments

- PDFs with specifications
- Spreadsheets (bill of materials)
- Images/screenshots for clarification
- Signed documents (if used with signing workflows)

Configuration

- `b2bquote/attachments/allowed_extensions`
- `b2bquote/attachments/max_filesize_mb`
- `b2bquote/attachments/disabled_statuses`

Screenshot placeholder: attachments tab + upload form

File: `./_screenshots/quote-attachments.png`

Cart & Order Conversion

B2B Quote Documentation · </b2b-quote/features/cart-order-conversion>

B2B Quote supports conversion flows:

- **Cart → Quote** (request a quote from the cart)
- **Quote → Order** (convert an accepted quote into a sales order)
- **Order → Quote** (create a quote from an existing order; admin or customer flows depending on setup)

Frontend Routes (Typical)

- Cart → Quote: `b2bquote/cart/converttoquote` (and `converttoquoteajax`)
- Order → Quote: `b2bquote/order/converttoquote`
- Quote actions live under `b2bquote/quote/*` (submit, accept, duplicate, merge/split, pdf export, etc.)

Configuration

Common settings:

- `b2bquote/frontend_settings/enable_cart_conversion`
- `b2bquote/checkout/*`
- `b2bquote/order_creation/*`

Order creation safeguards:

- `b2bquote/order_creation/price_change_behavior`
- `b2bquote/order_creation/stock_validation_behavior`
- `b2bquote/order_creation/product_availability_check`

Screenshot placeholder: cart conversion CTA + quote conversion screen

File: `./_screenshots/cart-to-quote.png`

Categories & Tags

B2B Quote Documentation · /b2b-quote/features/categories-tags

Use categories and tags to organize and filter quotes in the backend and reporting dashboards.

Use Cases

- Categorize quotes by department (e.g., “Spare Parts”, “Service”, “Wholesale”)
- Tag quotes by urgency (e.g., “hot lead”, “renewal”, “export”)

Screenshot placeholder: categories/tags management + filtering

File: `./_screenshots/admin-categories-tags.png`

Email Notifications

B2B Quote Documentation · /b2b-quote/features/email-notifications

The module sends emails on key events (submit, counter-offer, status changes, expiration reminders, messages, etc.).

Common Notifications

- Quote submitted (admin + customer)
- Counter-offer / price negotiated
- Status changed
- Expiration reminders
- Message notifications

Configuration

Email settings live under `b2bquote/email_notifications/*`.

Common fields:

- `email_sender`
- `admin_recipients` (comma-separated)
- `template_quote_submitted`
- `template_counter_offer`
- `template_status_changed`
- `template_quote_expired`
- `template_price_negotiated`
- `template_message_notification`
- `template_message_notification_admin`
- `expiration_reminder_intervals` (array field)
- `template_expiration_reminder`
- `attach_quote_pdf`
- `attach_customer_files`

Useful options:

- Admin recipients (comma-separated)
- Template selection per event
- Attach quote PDF (optional)
- Attach customer files (optional)

Expiration Reminders

Reminders are driven by:

- `b2bquote/email_notifications/expiration_reminder_intervals`

and executed by cron:

- `b2bquote_send_expiration_reminders`

See:

- Cron Jobs

Screenshot placeholder: email template selection + admin recipients field
File: `./_screenshots/config-email-notifications.png`

Frontend Experience

B2B Quote Documentation · </b2b-quote/features/frontend-experience>

This page documents what customers (and guests) see on the storefront, how the quote UI behaves, and which settings control it.

Key Frontend URLs

All storefront routes use Magento's `b2bquote` frontName:

- Quote list: `b2bquote/quote/index`
- Quote view: `b2bquote/quote/view?id={quoteId}`
- Quote edit: `b2bquote/quote/edit?id={quoteId}`

Guest quotes can also be accessed via token-based flows (see [Guest Quotes](#)).

“Add to Quote” Button

Controlled by:

- `b2bquote/frontend_settings/display_on_product`
- `b2bquote/frontend_settings/display_on_category`
- `b2bquote/frontend_settings/button_text`

Screenshot placeholder: PDP button + category listing button
File: `./_screenshots/frontend-add-to-quote.png`

Mini Quote (Header Dropdown)

The mini quote is a customer-data section that updates after actions like:

- adding/removing quote items
- duplicating quotes
- submitting/accepting quotes
- cart → quote conversion

Controlled by:

- `b2bquote/frontend_settings/enable_mini_quote`
- `b2bquote/frontend_settings/mini_quote_max_display`
- `b2bquote/frontend_settings/mini_quote_display_mode`

Screenshot placeholder: mini quote dropdown
File: `./_screenshots/frontend-mini-quote.png`

Quote Editing

Typical edit actions:

- update qty / notes
- upload temporary attachments
- bulk import items (CSV paste/upload) for faster entry
- bulk export items to CSV

Bulk items CSV format (export):

```
sku,qty,price,notes
```

Screenshot placeholder: quote edit page (items + bulk import/export)

File: `./_screenshots/frontend-quote-edit.png`

Cart → Quote Conversion

Controlled by:

- `b2bquote/frontend_settings/enable_cart_conversion`
- `b2bquote/frontend_settings/cart_conversion_min_amount`
- `b2bquote/frontend_settings/cart_conversion_button_text`

Route:

- `b2bquote/cart/converttoquote` (and ajax variant)

See:

- [Cart & Order Conversion](#)

Negotiation UI (Counter Offers)

Controlled by:

- `b2bquote/frontend_settings/allow_counter_offer`
- `b2bquote/pricing/negotiation_enabled`

See:

- [Price Negotiation](#)

Customer Experience Settings

Common UX-related settings:

- `b2bquote/customer_experience/use_customer_addressbook`
- `b2bquote/customer_experience/typical_response_time_days`
- `b2bquote/customer_experience/approval_validity_days`
- `b2bquote/customer_experience/draft_lifetime_days`

Guest Quotes

B2B Quote Documentation · /b2b-quote/features/guest-quotes

Allow visitors without an account to request quotes and access them via a secure token link.

What It Does

- Creates quotes without `customer_id` (guest email + access token)
- Sends a token URL to the guest to view/continue the quote
- Supports approval/acceptance and conversion flows depending on configuration

How Guest Access Works

Guest quotes are accessed via a token URL.

Screenshot placeholder: guest quote request form + token email
File: `./_screenshots/guest-quote-token-email.png`

Configuration

Enable and configure guest quotes under:

- `b2bquote/guest_quote/enabled`
- `b2bquote/guest_quote/quote_number_format` (default: `GQ-{increment_id}`)
- `b2bquote/guest_quote/access_token_pattern`

See also:

- [Configuration](#)

Inventory Reservation

B2B Quote Documentation · /b2b-quote/features/inventory-reservation

Optionally reserve stock when a quote is approved, and release it on expiration/rejection.

Configuration

- `b2bquote/inventory/reserve_on_approval`
- `b2bquote/inventory/reservation_compensation_code`
- `b2bquote/inventory/release_on_expiration`
- `b2bquote/inventory/release_on_rejection`

Screenshot placeholder: inventory reservation settings

File: `./_screenshots/config-inventory.png`

Merge & Split

B2B Quote Documentation · /b2b-quote/features/merge-split

Merge combines multiple quotes into one; split creates separate quotes out of a single quote (e.g., by shipping date, warehouse, or budget owner).

Merge

Common options:

- Include messages
- Include attachments
- Delete source quotes after merge

Split

Typical split strategies:

- Split by item selection
- Split by project/category

Configuration

Enable and configure:

- `b2bquote/quote_merge_split/merge_enabled`
- `b2bquote/quote_merge_split/split_enabled`
- `b2bquote/quote_merge_split/merge_messages_default`
- `b2bquote/quote_merge_split/merge_attachments_default`
- `b2bquote/quote_merge_split/delete_source_after_merge`

Screenshot placeholder: merge UI + split UI

File: `./_screenshots/admin-merge-split.png`

Messaging

B2B Quote Documentation · </b2b-quote/features/messaging>

Messaging provides a thread per quote so customers and admins can clarify requirements, pricing, delivery, and next steps.

Common Use Cases

- Ask technical questions about products
- Share delivery requirements
- Explain pricing decisions or counter-offers
- Keep an audit trail of communication for the quote

Email Notifications

Message notifications can be sent to customers and/or admin recipients.

Related settings:

- `b2bquote/messaging/*`
- `b2bquote/email_notifications/*`

Screenshot placeholder: message thread in quote view (frontend + admin)

File: `./_screenshots/quote-messages.png`

Price Negotiation

B2B Quote Documentation · </b2b-quote/features/negotiation>

Enable customers and sales teams to negotiate prices within quotes.

Negotiation Flow

Customer Request → Admin Pricing → Customer Review → Counter/Accept → Final Agreement

Customer Actions

Request Quote

1. Add products to cart
2. Click "Request Quote"
3. Add notes and requirements
4. Submit quote

Counter-Offer

When receiving admin pricing:

1. Review proposed prices
2. Click "Counter Offer" on items
3. Enter desired price
4. Submit counter-offer

Accept Quote

1. Review final pricing
2. Click "Accept Quote"
3. Proceed to checkout

Admin Actions

Review Quote

1. Open quote from **Sales > B2B Quotes**
2. Review customer requirements
3. Assess requested products

Set Pricing

Method	Description
Per-Item	Set custom price for each line item
Percentage	Apply percentage discount to items

Method	Description
Fixed Amount	Apply fixed discount
Use Pricing Rules	Apply automated pricing rules

Respond to Counter-Offer

1. Review customer's counter-offer
2. Accept, reject, or propose new price
3. Add message explaining decision

Negotiation Settings

Negotiation behavior is controlled by a few key settings:

- Enable negotiation engine:
 - `b2bquote/pricing/negotiation_enabled`
- Allow customer counter offers:
 - `b2bquote/frontend_settings/allow_counter_offer`
- Hide/show prices in frontend quote views:
 - `b2bquote/frontend_settings/show_prices`

See:

- [Settings Reference](#)

Communication

Messages

Both parties can send messages:

1. Open quote
2. Go to "Messages" tab
3. Type message
4. Click "Send"

See [Messaging](#) for configuration and best practices.

Attachments

Share documents:

- Specifications
- Contracts
- Bulk order requirements
- Custom configurations

See [Attachments](#) for upload rules and configuration.

Price Display

For Customers

Field	Description
Original Price	Catalog price
Quoted Price	Admin-set price
Savings	Discount amount
Savings %	Discount percentage

For Admins

Field	Description
Cost	Product cost (if configured)
Original Price	Catalog price
Proposed Price	Customer's counter-offer
Margin	Profit margin

Negotiation Best Practices

1. **Set Clear Limits:** Define minimum acceptable margins
2. **Use Pricing Rules:** Automate standard discounts
3. **Communicate Clearly:** Explain pricing decisions
4. **Track History:** Review past negotiations
5. **Set Deadlines:** Use quote validity periods

Related

- [Quote Lifecycle](#)
- [Pricing Rules](#)
- [Messaging](#)
- [Attachments](#)
- [Quote Management](#)

PDF Export & Layouts

B2B Quote Documentation · </b2b-quote/features/pdf-export>

Quotes can be exported as PDFs. The module supports multiple PDF layouts and a visual selector in configuration.

Built-In Layouts

Available layout codes typically include:

- `classic`, `minimalist`, `sidebar`, `color_block`, `compact`, `executive`

Configuration

- `b2bquote/pdf/pdf_layout`
- `b2bquote/pdf/pdf_logo_path`
- `b2bquote/pdf/pdf_company_name`
- `b2bquote/pdf/pdf_company_address`
- `b2bquote/pdf/pdf_company_phone`
- `b2bquote/pdf/pdf_company_email`
- `b2bquote/pdf/pdf_footer_text`

Screenshot placeholder: PDF layout visual selector + PDF preview

File: `./_screenshots/pdf-layout-selector.png`

Extending Layouts (Developer)

Custom layouts can be registered via DI into the layout pool (no plugins required).

See:

- [PDF Designer Add-On](#)

Pricing Rules

B2B Quote Documentation · </b2b-quote/features/pricing-rules>

Automate quote pricing with configurable rules.

Overview

Pricing rules automatically calculate discounts based on:

- Order quantity
- Order value
- Customer group
- Product categories
- Customer history

Rule Configuration

Sales > B2B Quotes > Pricing Rules

Create New Rule

1. Click "Add New Rule"
2. Configure conditions
3. Set discount action
4. Save rule

Rule Structure

Basic Settings

Field	Description
Name	Rule identifier
Description	Rule purpose
Status	Active/Inactive
Priority	Processing order (lower = first)
Store Views	Applicable stores

Conditions

Define when the rule applies:

Condition Type	Example
Quantity	If qty >= 100
Subtotal	If subtotal >= 5000
Customer Group	If group = Wholesale

Condition Type	Example
Category	If product in category X
SKU	If SKU matches pattern

Actions

Define the discount:

Action Type	Description
Percent Off	Percentage discount off original price (by_percent)
Fixed Off	Fixed discount per unit (by_fixed)
To Percent	Adjust price to X% of original (to_percent)
To Fixed Price	Adjust price to a fixed unit price (to_fixed)

Example Rules

Volume Discount

```
Name: Volume Discount 10%
Condition: Quantity >= 50
Action: 10% discount
```

Wholesale Pricing

```
Name: Wholesale Tier
Condition: Customer Group = Wholesale AND Subtotal >= 1000
Action: 15% discount
```

Category Discount

```
Name: Clearance Extra Discount
Condition: Category = Clearance
Action: Additional 5% off
```

Tiered Pricing

Quantity	Discount
10-49	5%
50-99	10%
100-499	15%
500+	20%

Rule Priority

Rules are processed by priority:

1. Lower number = higher priority
2. First matching rule wins (by default)
3. Can configure to stack discounts via `b2bquote/pricing_rules/can_stack_rules`

Rule Application

Automatic Application

When quote is reviewed:

1. System evaluates conditions
2. Matching rules are applied
3. Prices are updated automatically

Manual Override

Admins can:

- Override automatic pricing
- Add additional discounts
- Remove rule discounts

Rule Reports

Track rule effectiveness:

- **Usage Count:** How often applied
- **Discount Given:** Total discount amount
- **Affected Quotes:** Quotes using rule

Best Practices

1. **Clear Naming:** Use descriptive rule names
2. **Test Rules:** Verify with sample quotes
3. **Set Priorities:** Ensure correct processing order
4. **Regular Review:** Update rules for business changes
5. **Document Logic:** Keep records of pricing strategy

Related

- [Price Negotiation](#)
- [Workflow Rules](#)
- [Quote Management](#)

Screenshot placeholder: pricing rule editor (conditions/actions)

File: `./_screenshots/admin-pricing-rule.png`

Quote Fees

B2B Quote Documentation · /b2b-quote/features/quote-fees

Quote fees let you add fixed charges (e.g., handling, rush processing, packaging) to quotes.

Admin Management

Fees can be managed in the backend and applied to quotes based on your business rules.

Screenshot placeholder: quote fee grid + fee editor
File: `./_screenshots/admin-quote-fees.png`

Configuration

- `b2bquote/quote_fee/*`

Quote Lifecycle

B2B Quote Documentation · /b2b-quote/features/quote-lifecycle

Understanding the complete quote workflow from request to order.

Lifecycle Overview

Draft → Pending → In Review → Approved → Accepted → Ordered

State vs. Status

The lifecycle is usually implemented as a **state** machine (system-driven). In parallel, you can configure **statuses** for your business workflow and UI.

See:

- [Status Configuration](#)
- [Status Transitions](#)

Status Stages

1. Draft

Description: Customer is building the quote

Aspect	Details
Created By	Customer from cart or product page
Actions Available	Add/remove items, edit quantities, add notes
Visible To	Customer only
Transitions To	Submit

2. Submitted

Description: Quote submitted and waiting for admin review (often shown as “pending”)

Aspect	Details
Triggered By	Customer clicks "Submit Quote"
Actions Available	Admin can review, price, respond
Visible To	Customer and Admin
Transitions To	Review, Rejected

3. Under Review

Description: Admin is evaluating the quote

Aspect	Details
Triggered By	Admin opens quote for review
Actions Available	Set prices, add discounts, message customer
Visible To	Customer and Admin
Transitions To	Approved, Rejected, Needs Info

4. Approved

Description: Admin has set final pricing

Aspect	Details
Triggered By	Admin approves quote with pricing
Actions Available	Customer can accept or counter-offer
Visible To	Customer and Admin
Transitions To	Accepted, Counter-offer, Expired

5. Accepted

Description: Customer accepts the quoted prices

Aspect	Details
Triggered By	Customer accepts quote
Actions Available	Convert to order
Visible To	Customer and Admin
Transitions To	Ordered

6. Ordered

Description: Quote converted to order

Aspect	Details
Triggered By	Customer completes checkout
Actions Available	View order, view quote history
Visible To	Customer and Admin
Transitions To	- (Final state)

Additional Statuses

Rejected

Quote declined by admin with reason.

Expired

Quote validity period ended without action.

Cancelled

Quote cancelled by customer/admin.

Counter-Offer

Customer proposed different pricing.

Needs Information

Admin requested additional details.

Status Configuration

Admins can customize statuses:

1. Go to **Sales > B2B Quotes > Quote Statuses**
2. Add, edit, or disable statuses
3. Configure status colors and behaviors

See [Status Configuration](#) for details.

Workflow Automation

Automate status transitions with workflow rules:

- Auto-assign to admin on submit
- Auto-approve quotes under threshold
- Auto-expire after validity period
- Send notifications on status change

See [Workflow Rules](#) for configuration.

Related

- [Price Negotiation](#)
- [Guest Quotes](#)
- [Revision Tracking](#)
- [Merge & Split](#)
- [Status Configuration](#)
- [Workflow Rules](#)

Revision Tracking

B2B Quote Documentation · /b2b-quote/features/revision-tracking

Revision tracking creates snapshots when a quote changes, so you can see what changed over time and how the quote evolved during negotiation.

What Gets Tracked

Common changes that create revisions:

- Item price changes
- Quantity changes
- Status changes (depending on configuration)
- Customer submissions/acceptance (depending on configuration)

Configuration

Enable and tune retention:

- `b2bquote/revision/*`

Key settings:

- `b2bquote/revision/enabled_events`
- `b2bquote/revision/cleanup_enabled`
- `b2bquote/revision/cleanup_days`

See:

- [Settings Reference](#)
- [Cron Jobs](#)

Screenshot placeholder: quote history / revision timeline

File: `./_screenshots/admin-revision-history.png`

Shipping

B2B Quote Documentation · /b2b-quote/features/shipping

Quotes can include shipping requirements, thresholds, and shipping amount handling depending on your configuration.

Configuration

- `b2bquote/shipping/required`
- `b2bquote/shipping/free_shipping_threshold`
- `b2bquote/shipping/disallowed_methods`

Screenshot placeholder: quote shipping section in frontend + admin

File: `./_screenshots/quote-shipping.png`

Workflow Rules

B2B Quote Documentation · /b2b-quote/features/workflow-rules

Automate quote processing with event-driven workflow rules.

Overview

Workflow rules execute actions when specific events occur:

- Quote submitted
- Status changed
- Quote approved
- Quote expired

Rule Configuration

Sales > B2B Quotes > Workflow Rules

Create New Rule

1. Click "Add New Rule"
2. Select trigger event
3. Configure conditions
4. Define actions
5. Save rule

Rule Structure

Basic Settings

Field	Description
Name	Rule identifier
Description	Rule purpose
Status	Active/Inactive
Priority	Execution order

Trigger Events

Event	Description
quote_submitted	Customer submits new quote
quote_updated	Quote details changed
status_changed	Status transition
quote_approved	Admin approves quote
quote_accepted	Customer accepts quote
quote_expired	Validity period ended

Event	Description
message_received	New message added

Screenshot placeholder: workflow rule trigger + action selector
File: [./_screenshots/admin-workflow-rule.png](#)

Conditions

Additional filters:

Condition	Example
Subtotal	>= \$5000
Customer Group	= Wholesale
Status From	= Submitted
Status To	= Approved
Item Count	>= 10

Actions

Action	Description
Send Email	Notification to customer/admin
Change Status	Update quote status
Assign Admin	Assign to sales rep
Add Tag	Apply tag to quote
Apply Pricing Rule	Trigger pricing calculation
Create Task	Generate follow-up task

Example Rules

Auto-Assign High-Value Quotes

Event: quote_submitted
Condition: Subtotal >= 10000
Action: Assign to Senior Sales Rep

Auto-Approve Small Orders

Event: quote_submitted
Condition: Subtotal < 500 AND Customer Group = Trusted
Action: Change status to Approved, Apply standard discount

Expiration Warning

```
Event: daily_check
Condition: Days until expiry = 3
Action: Send reminder email to customer
```

Escalation Rule

```
Event: quote_updated
Condition: Days in status >= 5 AND Status = Under Review
Action: Send escalation email to manager
```

Workflow Chains

Link multiple rules:

1. **Quote Submitted** → Auto-assign
2. **Quote Assigned** → Send notification
3. **Quote Approved** → Apply pricing
4. **Quote Accepted** → Prepare order

Email Templates

Configure notification templates:

Marketing > Email Templates

Template	Purpose
quote_new	New quote notification
quote_status_update	Status change notification
quote_approved	Approval notification
quote_expiring	Expiration warning

Logging

All workflow actions are logged:

1. Go to quote detail
2. Open "History" tab
3. View all automated actions

Best Practices

1. **Start Simple:** Begin with basic rules
2. **Test Thoroughly:** Verify with test quotes
3. **Monitor Performance:** Check rule execution times
4. **Avoid Loops:** Ensure rules don't trigger each other infinitely
5. **Document Rules:** Maintain rule documentation

Related

- [Quote Lifecycle](#)
- [Pricing Rules](#)
- [Status Configuration](#)
- [Status Transitions](#)
- [Settings Reference](#)

Add-Ons

B2B Quote Documentation · </b2b-quote/addons>

Optional modules that extend the B2B Quote extension.

Available Add-Ons

Add-On	Package	Module	Docs
REST API	<code>mageb2b/b2b-quote-api</code>	<code>MageB2B_B2BQuoteApi</code>	REST API Add-On
GraphQL	<code>mageb2b/b2b-quote-graph-ql</code>	<code>MageB2B_B2BQuoteGraphQL</code>	GraphQL Add-On
CSV Import/Export	<code>mageb2b/b2b-quote-importexport</code>	<code>MageB2B_B2BQuoteImportExport</code>	CSV Quote Import/Export
PDF Designer	<code>mageb2b/b2b-quote-pdfdesigner</code>	<code>MageB2B_B2BQuotePdfDesigner</code>	PDF Designer
Hyvä Theme	<code>mageb2b/b2b-quote-hyva</code>	<code>MageB2B_B2BQuoteHyva</code>	Hyvä Theme Add-On

REST API Add-On

B2B Quote Documentation · /b2b-quote/addons/api

This documentation describes the optional **B2B Quote REST API add-on** (module: `MageB2B_B2BQuoteApi`, package: `mageb2b/b2b-quote-api`).

If you don't have the add-on installed, the endpoints below won't be available.

Installation

1) Require package

```
composer config bearer.repo.softwaresilo.io <token>
composer config repositories.softwaresilo composer
https://repo.softwaresilo.io/
composer require mageb2b/b2b-quote-api:*
```

2) Enable module + run setup

```
php bin/magento module:enable MageB2B_B2BQuoteApi
php bin/magento setup:upgrade
php bin/magento cache:flush
```

What It Provides

- Admin REST endpoints (manage any quote)
- Customer REST endpoints (ownership checks)
- Guest token endpoints (anonymous access to guest quotes)
- Management endpoints for categories/tags/status transitions/revisions (ACL-protected)

Authentication & Authorization

Magento REST authentication options:

- **Admin / Integration:** Integration token (ACL-controlled)
- **Customer:** Customer token (self resource)
- **Guest token quotes:** `anonymous` for the specific guest endpoints (access token required)

Endpoint Reference

Full endpoint reference and examples:

- [REST API](#)

Screenshot placeholder: API settings / token creation in Magento
File: `./_screenshots/api-token.png`

GraphQL Add-On

B2B Quote Documentation · [/b2b-quote/addons/graphql](#)

The GraphQL integration for B2B Quote is provided as a **separate add-on module** (not part of the REST API add-on).

What It Typically Adds

- GraphQL queries to fetch quotes (customer context)
- GraphQL mutations to submit/accept quotes, update items, add messages, etc.
- Schema types mirroring quote state/status, totals, items, attachments, messages

Installation (Composer)

1) Require package

```
composer config bearer.repo.softwaresilo.io <token>
composer config repositories.softwaresilo composer
https://repo.softwaresilo.io/
composer require mageb2b/b2b-quote-graph-ql:*
```

2) Enable module + run setup

```
php bin/magento module:enable MageB2B_B2BQuoteGraphQL
php bin/magento setup:upgrade
php bin/magento cache:flush
```

Adjust module name if your package provides a different Magento module identifier.

Notes

- GraphQL usually requires store/customer context; test with a customer token.
- Keep REST and GraphQL permissions aligned with your API governance.

Screenshot placeholder: GraphQL playground / Insomnia example
File: `./_screenshots/graphql-example.png`

Hyvä Theme Add-On

B2B Quote Documentation · /b2b-quote/addons/hyva

If your storefront uses **Hyvä**, install the Hyvä compatibility module for B2B Quote so quote UI components and customer pages render correctly.

Installation (Composer)

1) Require package

```
composer config bearer.repo.softwaresilo.io <token>
composer config repositories.softwaresilo composer
https://repo.softwaresilo.io/
composer require mageb2b/b2b-quote-hyva:*
```

2) Enable module + run setup

```
php bin/magento module:enable MageB2B_B2BQuoteHyva
php bin/magento setup:upgrade
php bin/magento cache:flush
```

What It Affects

- Hyvä-compatible templates/layouts for quote UI blocks
- Customer quote pages and actions (list/view/edit)
- Mini quote UX (if enabled)

What To Verify After Installation

- “Add to Quote” button renders on PDP/category (if enabled)
- Mini Quote works (if enabled)
- Customer quote list + quote detail pages load and actions work

Screenshot placeholder: Hyvä quote UI components
File: `./_screenshots/hyva-quote-ui.png`

Troubleshooting

If UI changes don't show up:

```
php bin/magento cache:flush
```

CSV Quote Import/Export Add-On

B2B Quote Documentation · /b2b-quote/addons/import-export

Import and export quote-related entities via CSV.

This add-on is package: `mageb2b/b2b-quote-importexport` (module: `MageB2B_B2BQuoteImportExport`).

Supported Entities

Common imports/exports include:

- Quotes
- Quote items
- Quote addresses
- Quote messages
- Projects
- Categories
- Tags
- Statuses
- Status transitions
- Quote fees

Export-only:

- Quote revisions
- Quote revision items

Admin Import/Export (Magento UI)

The module registers entities into Magento's Import/Export system, so you can import/export from the backend:

- **System → Data Transfer → Import** (select one of the B2B Quote entities)
- **System → Data Transfer → Export** (select one of the B2B Quote entities)

Screenshot placeholder: Magento import/export screen with B2B Quote entities
File: `./_screenshots/importexport-admin.png`

CLI Usage

The module provides CLI commands per entity.

Screenshot placeholder: CLI import run + result in admin grid
File: `./_screenshots/csv-import-cli.png`

Common command names:

```
bin/magento b2bquote:import-quotes <file.csv>
bin/magento b2bquote:import-quote-items <file.csv>
bin/magento b2bquote:import-quote-addresses <file.csv>
bin/magento b2bquote:import-quote-messages <file.csv>
bin/magento b2bquote:import-quote-projects <file.csv>
bin/magento b2bquote:import-quote-statuses <file.csv>
bin/magento b2bquote:import-quote-status-transitions <file.csv>
bin/magento b2bquote:import-quote-categories <file.csv>
bin/magento b2bquote:import-quote-tags <file.csv>
bin/magento b2bquote:import-quote-fees <file.csv>
```

Exact command names and options depend on your installed version; use `bin/magento list | grep b2bquote:import` to see what's available.

Example CSV (Core Item Export)

For quick item editing inside a quote, the core module can export/import items with this format:

```
sku,qty,price,notes
PROD-001,10,99.50,"Urgent delivery"
```

This is separate from the Import/Export add-on entities and is described here:

- [Frontend Experience](#)

PDF Designer Add-On

B2B Quote Documentation · /b2b-quote/addons/pdf-designer

Visual drag & drop PDF layout editor for quote exports.

This add-on is:

- Composer package: `mageb2b/b2b-quote-pdfdesigner`
- Magento module: `MageB2B_B2BQuotePdfDesigner`

What You Get

- Visual layout editor in the Magento admin
- Layout storage (DB) + repository
- Variable system (built-in + extendable via providers)
- Rendering pipeline (PDF renderer + element renderers)

Screenshot placeholder: custom layout tile in the selector
File: `./_screenshots/pdf-custom-layout.png`

Installation

1) Require package

```
composer config bearer.repo.softwaresilo.io <token>
composer config repositories.softwaresilo composer
https://repo.softwaresilo.io/
composer require mageb2b/b2b-quote-pdfdesigner:*
```

2) Enable module + run setup

```
php bin/magento module:enable MageB2B_B2BQuotePdfDesigner
php bin/magento setup:upgrade
php bin/magento setup:di:compile
php bin/magento setup:static-content:deploy
php bin/magento cache:flush
```

Where To Configure It (Admin)

- PDF layout selector: **Stores** → **Configuration** → **MageB2B** → **B2B Quote** → **PDF Settings**
 - config key: `b2bquote/pdf/pdf_layout`

See:

- [PDF Export & Layouts](#)
- [Settings Reference](#)

Screenshot placeholder: PDF designer UI / layout editor
File: `./_screenshots/pdf-designer-ui.png`

Variables

Variables are resolved during PDF generation.

Template Syntax

Variables use `{{variable_code}}` with optional formatting:

```
{{my_variable}}           // Raw value
{{my_variable|uppercase}} // UPPERCASE
{{my_variable|date:Y-m-d}} // Custom date format
{{my_variable|currency}}  // Currency format
{{my_variable|truncate:50}} // Max 50 chars
```

Variable Types

Type	Description
string	Plain text
number	Numeric value
currency	Money amount (formatted)
date	Date/time (formatted)

Adding Custom Variables (Developer)

Third-party modules can add custom variables to the designer UI by registering a variable provider.

1) Create a Variable Provider

```
<?php
declare(strict_types=1);

namespace Vendor\Module\Model\Variable\Provider;

use MageB2B\B2BQuotePdfDesigner\Api\VariableProviderInterface;
use MageB2B\B2BQuotePdfDesigner\Model\Variable\VariableDefinition;

class CustomProvider implements VariableProviderInterface
{
    public function getCategoryCode(): string
    {
        return 'custom';
    }
}
```

```

public function getCategoryLabel(): string
{
    return (string)__('CUSTOM');
}

public function getSortOrder(): int
{
    return 100;
}

public function getVariables(): array
{
    return [
        new VariableDefinition(
            code: 'my_variable',
            label: __('My Variable'),
            description: __('Description for UI'),
            type: 'string' // string, number, currency, date
        ),
    ];
}

public function canResolve(string $variableCode): bool
{
    return $variableCode === 'my_variable';
}

public function resolve(string $variableCode, array $context): mixed
{
    $quote = $context['quote'] ?? null;
    $store = $context['store'] ?? null;

    return match ($variableCode) {
        'my_variable' => 'resolved value',
        default => ''
    };
}
}

```

2) Register the Provider (DI)

```

<type name="MageB2B\B2BQuotePdfDesigner\Model\Variable\ProviderPool">
    <arguments>
        <argument name="providers" xsi:type="array">
            <item name="custom"
xsi:type="object">Vendor\Module\Model\Variable\Provider\CustomProvider</ite
m>
            </argument>
        </arguments>
    </type>

```

Context Data

The `$context` array contains:

- `quote` (B2B quote model)
- `store` (store model)
- `page_number` (current page number)
- `page_count` (total pages)

Troubleshooting

UI Not Loading / Missing JS

```
php bin/magento setup:static-content:deploy
php bin/magento cache:flush
```

See also:

- [PDF Export & Layouts](#)

Quote Categories

B2B Quote Documentation · /b2b-quote/admin/categories

Categories are internal labels to classify quotes (department, product line, channel, etc.).

Location:

- **Sales → B2B Quotes → Quote Categories**

How Categories Are Used

- filter quotes in the grid
- dashboard breakdowns
- workflow/pricing rule conditions (depending on rules configuration)

Recommended Setup

- Keep categories stable (avoid renaming frequently)
- Use tags for ad-hoc “campaign labels” or temporary markers

API & Import/Export

- REST API endpoints exist in the REST API add-on.
- CSV import/export is available via the import/export add-on.

See:

- [REST API](#)
- [CSV Quote Import/Export Add-On](#)

Screenshot placeholder: categories grid + category editor

File: `./_screenshots/admin-categories.png`

Analytics Dashboard

B2B Quote Documentation · </b2b-quote/admin/dashboard>

The Analytics Dashboard provides KPI and chart views over your quote pipeline.

Location:

- **Sales → B2B Quotes → Analytics Dashboard**

What You Typically See

- Funnel (draft → submitted/pending → approved → accepted → ordered)
- Timeline charts (volume, value)
- Expiring quotes
- Customers and products insights
- Categories/tags breakdown
- Drill-down views linking to specific quotes

Export

Depending on permissions, users can export dashboard data (e.g. CSV/PDF).

Permissions (ACL)

Dashboard permissions are separate from general quote management:

- `MageB2B_B2BQuote::dashboard_view`
- `MageB2B_B2BQuote::dashboard_export`

See:

- [Admin Permissions \(ACL\)](#)

Screenshot placeholder: dashboard overview

File: `./_screenshots/admin-analytics-dashboard.png`

Projects & Categories

B2B Quote Documentation · /b2b-quote/admin/organization

Organize quotes using projects and categories.

This page is an overview. For deep dives per admin menu item, use:

- [Projects](#)
- [Quote Categories](#)
- [Quote Tags](#)

Projects

Projects allow customers to group related quotes.

Customer View

Customers can:

1. Create projects
2. Assign quotes to projects
3. View all quotes in a project
4. Track project totals

Project Fields

Field	Description
Name	Project identifier
Description	Project details
Reference	External reference number
Start Date	Project start
End Date	Project deadline
Budget	Allocated budget

Admin Project Management

Sales > B2B Quotes > Projects

Column	Description
Project Name	Project identifier
Customer	Project owner
Quotes	Number of quotes
Total Value	Combined quote value
Status	Active/Completed

Categories

Internal classification for admin organization.

Category Configuration

Sales > B2B Quotes > Quote Categories

1. Click "Add Category"
2. Enter name and description
3. Set color
4. Save

Category Assignment

Assign categories to quotes:

1. Open quote
2. Select category from dropdown
3. Save

Category Uses

- Filter quotes by category
- Generate reports by category
- Set workflow rules by category

Tags

Flexible labeling for quick identification.

Adding Tags

1. Open quote
2. Enter tags (comma-separated)
3. Save

Tag Features

- Filter by tag
- Multiple tags per quote
- Autocomplete from existing tags
- Tag reports

Quote Grouping

By Customer

View all quotes for a customer:

1. Go to **Customers > All Customers**
2. Open customer

3. Click "B2B Quotes" tab

By Product

Find quotes containing a product:

1. Go to **Sales > B2B Quotes > Quotes**
2. Use "Product SKU" filter
3. Enter SKU

By Sales Rep

Filter by assigned admin:

1. Use "Assigned To" filter
2. Select admin
3. View assigned quotes

Organization Best Practices

Project Structure

- Use projects for multi-quote deals
- Track project budgets
- Link related quotes

Category Strategy

- Keep categories broad
- Use for department/team routing
- Limit to 5-10 categories

Tag Usage

- Use for specific attributes
- Keep tags consistent
- Review and consolidate regularly

Reports by Organization

Project Reports

Report	Description
Project Summary	Overview by project
Project Timeline	Activity over time
Budget vs Actual	Budget tracking

Category Reports

Report	Description
By Category	Quotes per category
Category Performance	Conversion by category

Related

- [Quote Management](#)
- [Projects](#)
- [Quote Categories](#)
- [Quote Tags](#)
- [Quote Lifecycle](#)

Pricing Rules (Admin)

B2B Quote Documentation · /b2b-quote/admin/pricing-rules

Pricing rules let you apply structured discounts automatically when quotes meet conditions.

Location:

- **Sales → B2B Quotes → Pricing Rules**

What Admins Configure

- Conditions (customer group, category, subtotal, item count, ...)
- Discount action types (aligned with the quote discount calculator)
- Priority and stacking behavior

Stacking behavior is configured globally:

- `b2bquote/pricing_rules/can_stack_rules`

See:

- [Pricing Rules](#)
- [Settings Reference](#)

Screenshot placeholder: pricing rule editor

File: `./_screenshots/admin-pricing-rule.png`

Projects

B2B Quote Documentation · /b2b-quote/admin/projects

Projects help customers (and admins) group related quotes (e.g., one construction site, one procurement campaign, one tender).

Location:

- **Sales → B2B Quotes → Projects**

Common Workflow

1. Customer creates or selects a project
2. Quotes are assigned to the project
3. Sales can filter by project and track totals and status distribution

Typical Project Fields

- Name
- Description / notes
- External reference (ERP / internal ticket)
- Budget and deadlines (depending on setup)

Automation

Projects can be used in:

- filtering and dashboards
- workflow rule conditions

Import/Export

Projects can be imported/exported via the CSV add-on:

- **CSV Quote Import/Export Add-On**

Screenshot placeholder: projects grid + project editor

File: `./_screenshots/admin-projects.png`

Quote Fees

B2B Quote Documentation · /b2b-quote/admin/quote-fees

Quote fees are additional charges applied to a quote (handling, packaging, rush processing, etc.).

Location:

- **Sales → B2B Quotes → Quote Fees**

Tax Handling

Tax behavior is controlled by:

- `b2bquote/quote_fee/apply_tax`
- `b2bquote/quote_fee/fee_includes_tax`
- `b2bquote/quote_fee/tax_class_id`

See:

- [Settings Reference](#)

Screenshot placeholder: quote fees grid + fee editor

File: `./_screenshots/admin-quote-fees.png`

Quote Management

B2B Quote Documentation · </b2b-quote/admin/quotes>

Manage customer quotes from the admin panel.

Screenshot placeholder: quotes grid
File: `./_screenshots/admin-quotes-grid.png`

Quote Grid

Sales > B2B Quotes > Quotes

Grid Columns

Column	Description
Quote ID	Unique identifier
Customer	Customer name and email
Company	Customer's company
Status	Current quote status
Items	Number of line items
Subtotal	Quote total value
Created	Submission date
Updated	Last modification
Assigned To	Responsible admin
Expires	Validity end date

Filtering

Filter quotes by:

- Status
- Customer
- Date range
- Assigned admin
- Subtotal range
- Store view

Mass Actions

Action	Description
Assign	Assign to admin
Change Status	Bulk status update

Action	Description
Delete	Remove quotes
Export	Export to CSV
Merge	Merge selected quotes (if enabled/allowed)

Quote Detail View

Screenshot placeholder: quote detail view

File: `./_screenshots/admin-quote-view.png`

Quote Information

Tab	Contents
Overview	Summary, customer, totals
Items	Line items with pricing
Messages	Communication history
Attachments	Uploaded files
History	Status changes, actions
Revisions / Compare	Revision history and comparisons (if enabled)

Editing Quote Items

1. Open quote
2. Go to "Items" tab
3. Click "Edit" on item
4. Modify quantity, price, or discount
5. Save changes

Adding Items

1. Click "Add Products"
2. Search and select products
3. Set quantities
4. Apply pricing
5. Save

Bulk Import/Export (Items)

The module includes item-level bulk operations to speed up editing:

- **Bulk export** generates a CSV with `sku,qty,price,notes`
- **Bulk import** accepts CSV upload or pasted CSV text and supports modes like "add" vs "overwrite"

These are intended for quickly editing quote items, and are separate from the CSV import/export add-on (which can import entities like statuses, tags, transitions, projects, etc.).

See:

- [Frontend Experience](#)
- [CSV Quote Import/Export Add-On](#)

Setting Prices

Method	Description
Custom Price	Enter specific price per item
Discount %	Apply percentage discount
Discount Amount	Apply fixed discount
Apply Rules	Use pricing rules

Quote Actions

Approve Quote

1. Review items and pricing
2. Click "Approve"
3. Add optional message
4. Confirm

Reject Quote

1. Click "Reject"
2. Select rejection reason
3. Add explanation
4. Confirm

Request Information

1. Click "Request Info"
2. Enter questions
3. Send to customer

Convert to Order

After customer accepts:

1. Click "Convert to Order"
2. Review order details
3. Complete order creation

Merge & Split

Admins can also merge/split quotes depending on your configuration and permissions.

See:

- [Merge & Split](#)
- [Admin Permissions \(ACL\)](#)

PDF Export

Admins can generate quote PDFs and (depending on UI) mass-export PDFs.

See:

- [PDF Export & Layouts](#)
- [PDF Designer Add-On](#)

Communication

Sending Messages

1. Go to "Messages" tab
2. Type message
3. Click "Send"
4. Customer receives email notification

Viewing History

1. Go to "History" tab
2. View all actions and status changes
3. Filter by date or type

Attachments

Viewing Attachments

1. Go to "Attachments" tab
2. Click file to download
3. View file details

Adding Attachments

1. Click "Add Attachment"
2. Upload file
3. Add description
4. Save

Quote Assignment

Manual Assignment

1. Open quote
2. Select admin from dropdown
3. Save

Automatic Assignment

Configure workflow rules for auto-assignment based on:

- Customer group

- [Quote value](#)
- [Product categories](#)
- [Round-robin distribution](#)

Reports

Reports > B2B Quotes

Report	Description
Quote Summary	Total quotes by status
Conversion Rate	Quotes converted to orders
Average Value	Average quote amounts
Response Time	Time to first response
By Sales Rep	Performance by admin

Related

- [Analytics Dashboard](#)
- [Status Configuration](#)
- [Projects & Categories](#)
- [Quote Lifecycle](#)
- [Revision Tracking](#)

Status Transitions

B2B Quote Documentation · </b2b-quote/admin/status-transitions>

Status transitions define which status changes are allowed (and can be validated/enforced by workflow rules).

Why It Matters

- Prevent invalid jumps (e.g., `draft` → `ordered`)
- Enforce internal process rules (review before approval)
- Keep automation predictable

Note: Frontend and admin UI always validate transitions. Workflow rule actions can optionally bypass/validate depending on `b2bquote/workflow/transition_validation`.

Where to Configure

In the Magento admin under the B2B Quote section:

- Status transitions grid
- Per-transition rules (allowed source/target)

Screenshot placeholder: status transitions grid + transition editor
File: `./_screenshots/admin-status-transitions.png`

Status Configuration

B2B Quote Documentation · /b2b-quote/admin/statuses

Configure custom quote statuses for your workflow.

State vs. Status (Important)

B2B Quote typically distinguishes between:

- **State**: fixed lifecycle stage (system-driven, used by business logic)
- **Status**: configurable label used for workflow / UI / filtering (admin-managed)

In practice:

- states describe *where the quote is in the lifecycle* (draft, pending, in_review, approved, accepted, ordered, expired, cancelled...)
- statuses describe *your business process* (e.g. "Needs Tech Review", "Waiting for Vendor", "Approved – Awaiting PO")

See:

- [Quote Lifecycle](#)

Status Management

Sales > B2B Quotes > Quote Statuses

Create Status

1. Click "Add New Status"
2. Configure settings
3. Save

Status Settings

Field	Description
Label	Display name
Code	Unique identifier (cannot change after save)
Color	Display color in grid
Position	Sort order
Is Active	Enable/disable status

Allowed Transitions

Status transitions are configured in a dedicated admin screen:

- [Status Transitions](#)

Tip: If transitions are too strict, admins/customers will see “invalid transition” errors. Start with a permissive matrix, then tighten.

Status Colors

Visual identification in grids:

Default Color	Status Type
Gray	Draft, Pending
Blue	In Progress
Green	Positive (Approved, Accepted)
Red	Negative (Rejected, Expired)
Purple	Final (Ordered)

Custom Status Examples

Needs Approval

```
Label: Needs Approval
Code: needs_approval
Color: Orange
Behavior: Visible to customer, Allow messages
Transitions From: Review
Transitions To: Approved, Rejected
```

On Hold

```
Label: On Hold
Code: on_hold
Color: Yellow
Behavior: Hidden from customer, No editing
Transitions From: Any active status
Transitions To: Review, Rejected
```

Partial Accepted

```
Label: Partially Accepted
Code: partial_accept
Color: Light Green
Behavior: Visible, Allow messages
Transitions From: Approved
Transitions To: Accepted, Negotiation
```

Status Workflow

Simple Workflow

```
Draft → Submitted → Review → Approved → Accepted → Ordered
                        ↓
                      Rejected
```

Advanced Workflow

```
Draft → Submitted → Review → Needs Approval → Approved → Accepted → Ordered
                        ↓           ↓           ↓
                   On Hold   Rejected   Counter Offer
                        ↓           ↓           ↓
                   Review     Re-Review → Approved
```

Translation

Status labels support multiple store views:

1. Open status
2. Switch store view
3. Enter translated label
4. Save

Best Practices

1. **Keep It Simple:** Start with default statuses
2. **Clear Names:** Use descriptive labels
3. **Logical Transitions:** Define sensible workflows
4. **Consistent Colors:** Use color coding meaningfully
5. **Document Changes:** Record custom status purposes

Related

- [Quote Management](#)
- [Quote Lifecycle](#)
- [Status Transitions](#)
- [Workflow Rules](#)

Quote Tags

B2B Quote Documentation · </b2b-quote/admin/tags>

Tags are flexible labels used for quick filtering and reporting (e.g. `hot-lead`, `renewal`, `export`, `needs-tech-review`).

Location:

- **Sales → B2B Quotes → Quote Tags**

Best Practices

- Keep tags lowercase and consistent (choose one style)
- Prefer tags for temporary markers; use categories for stable classification

API & Import/Export

The REST API add-on provides tag endpoints (including “popular tags”).

See:

- [REST API](#)
- [CSV Quote Import/Export Add-On](#)

Screenshot placeholder: tags grid + popular tags

File: `./_screenshots/admin-tags.png`

Workflow Rules (Admin)

B2B Quote Documentation · /b2b-quote/admin/workflow-rules

Workflow rules automate quote processing and can apply actions on events like submission, status changes, reminders, etc.

Location:

- **Sales → B2B Quotes → Workflow Rules**

Transition Validation

There are two layers:

- **Frontend and Admin UI:** always validate transitions
- **Workflow actions:** optionally validate transitions depending on:
 - `b2bquote/workflow/transition_validation`

See:

- [Workflow Rules](#)
- [Status Transitions](#)

Screenshot placeholder: workflow rule editor

File: `./_screenshots/admin-workflow-rule.png`

REST API

B2B Quote Documentation · /b2b-quote/api

Complete API documentation for B2B Quote integration.

Requires the optional **REST API add-on**: `mageb2b/b2b-quote-api` (`MageB2B_B2BQuoteApi`).

GraphQL is a separate add-on:

- [GraphQL Add-On](#)

Authentication

Magento REST authentication depends on the endpoint type:

- **Admin / Integration endpoints**: Integration token + ACL permission
- **Customer endpoints**: customer token (`self` resource)
- **Guest token endpoints**: `anonymous` access but require a **guest quote access token**

Example (admin/integration token):

```
curl -X GET "https://your-store.com/rest/V1/b2bquote/quotes" \  
-H "Authorization: Bearer {token}"
```

Endpoint Groups

Admin (ACL-protected)

Method	URL	Purpose
GET	<code>/V1/b2bquote/quotes</code>	List quotes (any customer)
GET	<code>/V1/b2bquote/quotes/{quoteId}</code>	Get quote by id
POST	<code>/V1/b2bquote/quotes</code>	Create draft quote
PUT	<code>/V1/b2bquote/quotes/{quoteId}</code>	Save/update quote
DELETE	<code>/V1/b2bquote/quotes/{quoteId}</code>	Delete quote
POST	<code>/V1/b2bquote/quotes/{quoteId}/status</code>	Change status (admin flow)
POST	<code>/V1/b2bquote/quotes/{quoteId}/pricing/apply</code>	Apply pricing rules
POST	<code>/V1/b2bquote/quotes/{quoteId}/workflow/apply</code>	Apply workflow rules

Customer (ownership checked)

Method	URL	Purpose
GET	<code>/V1/b2bquote/me/quotes</code>	List my quotes
GET	<code>/V1/b2bquote/me/quotes/{quoteId}</code>	Get my quote

Method	URL	Purpose
POST	/V1/b2bquote/quotes/{quoteId}/submit	Submit quote
POST	/V1/b2bquote/quotes/{quoteId}/accept	Accept quote
POST	/V1/b2bquote/quotes/{quoteId}/items	Add item
PUT	/V1/b2bquote/quotes/{quoteId}/items/{itemId}	Update item
DELETE	/V1/b2bquote/quotes/{quoteId}/items/{itemId}	Remove item
POST	/V1/b2bquote/quotes/{quoteId}/messages	Add message
POST	/V1/b2bquote/quotes/{quoteId}/attachments	Add attachment
POST	/V1/b2bquote/quotes/{quoteId}/addresses	Set addresses

Guest (token-based)

Method	URL	Purpose
GET	/V1/b2bquote/guest/quotes/{token}	Get guest quote by access token
POST	/V1/b2bquote/guest/quotes/{token}/accept	Accept guest quote by access token

Categories, Tags, Status Transitions, Revisions (ACL-protected)

Area	Method	URL
Categories	GET	/V1/b2bquote/categories
Categories	GET	/V1/b2bquote/categories/active
Categories	GET	/V1/b2bquote/categories/{categoryId}
Categories	POST	/V1/b2bquote/categories
Categories	DELETE	/V1/b2bquote/categories/{categoryId}
Tags	GET	/V1/b2bquote/tags
Tags	GET	/V1/b2bquote/tags/popular
Tags	GET	/V1/b2bquote/tags/{tagId}
Tags	GET	/V1/b2bquote/quotes/{quoteId}/tags
Tags	POST	/V1/b2bquote/tags
Tags	DELETE	/V1/b2bquote/tags/{tagId}
Status transitions	GET	/V1/b2bquote/statuses/transitions
Status transitions	GET	/V1/b2bquote/statuses/transitions/{id}
Status transitions	POST	/V1/b2bquote/statuses/transitions
Status transitions	DELETE	/V1/b2bquote/statuses/transitions/{id}
Revisions	GET	/V1/b2bquote/quotes/{quoteId}/revisions
Revisions	GET	/V1/b2bquote/revisions/{revisionId}

Area	Method	URL
Revisions	GET	/V1/b2bquote/revisions/{revisionId1}/compare/{revisionId2}
Revisions	POST	/V1/b2bquote/quotes/{quoteId}/revisions
Revisions	POST	/V1/b2bquote/quotes/{quoteId}/revisions/{revisionId}/rollback

Notes & Tips

- For quote lifecycle, statuses, and transitions, see:
 - [Quote Lifecycle](#)
 - [Status Configuration](#)
 - [Status Transitions](#)
- For guest quotes and token access, see:
 - [Guest Quotes](#)

Response:

```
{
  "order_id": 1001,
  "increment_id": "000001001"
}
```

Error Codes

Code	Description
400	Bad request (validation error)
401	Unauthorized
403	Forbidden (permission denied)
404	Quote not found
409	Conflict (invalid status transition)

Rate Limiting

- 1000 requests per hour per token
- Rate limit headers included in response

Webhooks

Configure webhooks for quote events:

Stores > Configuration > MageB2B > B2B Quote > API

Event	Payload
quote.created	New quote data
quote.updated	Updated quote data
quote.status_changed	Status change details

Related

- [Quote Lifecycle](#)
- [Quote Management](#)

Troubleshooting

B2B Quote Documentation · /b2b-quote/troubleshooting

Common issues and solutions for the B2B Quote extension.

Quote Request Issues

"Request Quote" Button Not Visible

Symptoms:

- Button missing on cart page
- Button missing on product pages

Solutions:

1. Check if enabled

- Verify extension is enabled in configuration
- **Stores > Config > MageB2B > B2B Quote > Enable: Yes**

2. Check customer group

- Verify customer's group is allowed
- Check "Allowed Customer Groups" setting

3. Check minimum amount

- Cart may be below minimum quote amount
- Check "Minimum Order Amount" setting

4. Clear cache

```
php bin/magento cache:flush
```

Cannot Submit Quote

Symptoms:

- Submit button doesn't work
- Error on submission

Solutions:

1. Check for empty cart

- Quote must have at least one item

2. Check customer login

- If guest quotes disabled, customer must login

3. Check JavaScript errors

- Open browser console
- Look for JS errors

Status Issues

Status Won't Change

Symptoms:

- Cannot transition to certain status
- "Invalid transition" error

Solutions:

1. Check allowed transitions

- Review status configuration
- Verify transition is allowed

2. Check workflow rules

- Workflow rules may be blocking
- Review active rules

3. Check user permissions

- Admin may lack permission
- Review ACL settings

Quote Stuck in Status

Symptoms:

- Quote remains in same status
- Auto-expiration not working

Solutions:

1. Check cron

```
php bin/magento cron:run --group=b2bquote
```

2. Check workflow rules

- Rules may have errors
- Disable rules temporarily to test

3. Check transitions

- If transitions are too restrictive, status changes can fail
- Review: [Status Transitions](#)

4. Check expiration/reminder schedules

- Expiration and reminders run via cron jobs
- See: [Cron Jobs](#)

Pricing Issues

Prices Not Calculating

Symptoms:

- Custom prices not saving
- Pricing rules not applying

Solutions:

1. Check pricing rules

- Verify rules are active
- Check rule conditions

2. Check product prices

- Ensure products have valid prices
- Check for price scope issues

3. Reindex

```
php bin/magento indexer:reindex
```

Wrong Discount Applied

Symptoms:

- Unexpected discount amounts
- Multiple discounts stacking

Solutions:

1. Review rule priority

- Check rule priority order
- Ensure no conflicting rules

2. Check rule conditions

- Verify conditions match quote
- Test with simple conditions

Email Issues

Notifications Not Sending

Symptoms:

- No email on quote actions
- Emails in queue but not sent

Solutions:

1. Check email configuration

- Verify SMTP settings
- Test with other Magento emails

2. Check templates

- Templates must exist
- Check template configuration

3. Check queue

```
php bin/magento queue:consumers:start async.operations.all
```

4. Check logs

```
tail -100 var/log/mail.log  
tail -100 var/log/exception.log
```

PDF Issues

PDF Download Not Available

1. Check PDF restrictions:
 - `b2bquote/pdf/pdf_download_restricted_statuses`
2. Check PDF config:
 - `b2bquote/pdf/*`
3. If using the PDF Designer add-on, ensure static content is deployed:

```
php bin/magento setup:static-content:deploy
```

See:

- [PDF Export & Layouts](#)
- [PDF Designer Add-On](#)

API Issues (REST)

401 / “The consumer isn’t authorized...”

- Ensure you’re using the correct token type (admin integration vs customer token)
- Verify the integration user has ACL permissions for required endpoints

See:

- [REST API Add-On](#)
- [Admin Permissions \(ACL\)](#)

Import/Export Issues

Import Fails With Column Errors

- Use the sample CSV structure for the entity you import
- Verify separator/enclosure settings match your file
- Start with “append” behavior and a small file

See:

- [CSV Quote Import/Export Add-On](#)

Performance Issues

Slow Quote Loading

Solutions:

1. Clear cache

```
php bin/magento cache:flush
```

2. Check database indexes

```
php bin/magento indexer:status  
php bin/magento indexer:reindex
```

3. Enable flat tables

- Check if flat catalog enabled
- Consider enabling for better performance

Too Many Quotes

Solutions:

1. Archive old quotes

- Configure auto-archive settings
- Archive expired quotes

2. Clean up database

- Remove very old quotes
- Optimize tables

API Issues

Authentication Fails

Solutions:

1. Check token

- Verify token is valid
- Check token expiration

2. Check permissions

- API user needs quote permissions
- Review ACL resources

Webhook Not Firing

Solutions:

1. Check webhook configuration

- Verify URL is correct
- Check webhook is enabled

2. Check server logs

- Review webhook delivery logs
- Check for timeout issues

Debug Checklist

When troubleshooting:

1. ☐ Extension is enabled
2. ☐ Cache is cleared
3. ☐ Customer group is allowed
4. ☐ Status transitions are configured
5. ☐ Pricing rules are active
6. ☐ Email is configured
7. ☐ Cron is running
8. ☐ Check all log files

Log Files

Review these logs for errors:

```
tail -100 var/log/b2bquote.log  
tail -100 var/log/exception.log  
tail -100 var/log/system.log
```

Getting Help

If issues persist:

1. Enable debug mode and collect logs
2. Note exact error message
3. Document steps to reproduce
4. Contact support at info@softwaresilo.io

Related

- [Configuration](#)
- [Quote Lifecycle](#)
- [Workflow Rules](#)