B2B Quote Documentation

Complete PDF Manual

Guide for Magento administrators, technical project owners, and implementation teams.

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Table of Contents

B2B Quote Documentation · b2b-quote

B2B Quote Documentation

SoftwareSilo B2B Quote adds a request-for-quote and negotiation workflow to Magento 2. Customers can build a quote, submit it for review, exchange messages and files, accept an approved offer, and continue to an order or shopping cart according to store configuration.

Overview

The base package contains the storefront and Admin workflows. REST, GraphQL, Hyvä compatibility, entity import/export, OpenSign integration, the visual PDF designer, and sample data are separate packages. Install only the add-ons your project uses.

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)
Agreements	Reusable purchasing agreements and call-off quotes
Pricing Rules	Automated discount calculations
Workflow Rules	Event-driven automation
REST and GraphQL	Optional integration add-ons with customer, guest, and administrator operations
Hyvä compatibility	Optional templates and assets for Hyvä storefronts

Quick Start

1. Install the base extension.
2. Choose the customer groups and quote limits.
3. Check the supplied statuses and allowed transitions.
4. Sign in as an allowed customer and complete one quote from product selection through acceptance.
5. Add and test optional packages from the add-on overview only after the base flow works.

Documentation Sections

Getting Started

Features

Administration

Reference

Database Tables

The extension creates these tables:

Table	Purpose
`b2b_quote`	Main quote records
`b2b_quote_item`	Quote line items
`b2b_quote_address`	Quote billing and shipping addresses
`b2b_quote_state`	Fixed lifecycle states behind the configurable statuses
`b2b_quote_status`	Store-aware business statuses
`b2b_quote_status_transition`	Allowed status changes and actor rules
`b2b_quote_expiration_reminder`	Sent expiration reminders per quote
`b2b_quote_project`	Customer projects
`b2b_quote_category` / `b2b_quote_to_category`	Quote categories and their assignment

Table	Purpose
`b2b_quote_tag` / `b2b_quote_to_tag`	Quote tags and their assignment
`b2b_quote_message`	Communication
`b2b_quote_attachment`	File attachments
`b2b_quote_fee`	Quote fees
`b2b_quote_pricing_rule`	Pricing automation
`b2b_quote_workflow_rule`	Workflow automation
`b2b_quote_agreement`	Purchasing agreements created from quotes
`b2b_quote_agreement_item`	Agreement item quantities and agreed prices
`b2b_quote_revision` / `b2b_quote_revision_item`	Revision history of quotes and items

Requirements

Use a Magento Open Source or Adobe Commerce release and PHP runtime listed as supported for the current package. Check the current product compatibility information before installation or an upgrade instead of treating a copied version range as permanent.

The installed Composer metadata is authoritative for dependency resolution.

Installation Guide

This guide installs the base B2B Quote package. Add-ons such as GraphQL, Import/Export, OpenSign, and PDF Designer are installed separately after the base module is working.

Requirements

- A supported Magento Open Source or Adobe Commerce release
- A PHP runtime supported by that Magento release and the package
- Composer access to the SoftwareSilo package repository
- the PHP extensions `iconv`, `intl`, and `zip`

Check the current product compatibility information before installation. Keep Magento, PHP, and all B2B Quote packages on combinations that are supported together instead of relying on a version number copied from an older guide.

Back up the database and Magento files before changing modules in an existing store. Run the commands from the Magento project root.

Installation via Composer

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

Replace the placeholders with the repository host, key, URL and access token shown in your SoftwareSilo account under **Account > Licenses**. The central installation article explains the repository setup in detail.

Enable the Module

```
php bin/magento module:enable MageB2B_ExtensionManager
MageB2B_B2BQuote
php bin/magento setup:upgrade
php bin/magento cache:flush
```

For a production-mode store, rebuild generated code and static assets as part of your normal deployment process:

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

Verify Installation

Check that the module is installed:

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

The command should report that `MageB2B_B2BQuote` is enabled. Then sign in to Magento Admin and confirm that **B2B Quotes** appears in the menu and **Stores > Configuration > MageB2B > B2B Quote** opens without an error.

Database Tables

The installation creates a connected set of quote tables. The main groups are:

Area	Tables
Quotes and items	`b2b_quote`, `b2b_quote_item`, `b2b_quote_address`
Status workflow	`b2b_quote_state`, `b2b_quote_status`, `b2b_quote_status_transition`, `b2b_quote_expiration_reminder`
Customer organization	`b2b_quote_project`, `b2b_quote_category`, `b2b_quote_to_category`, `b2b_quote_tag`, `b2b_quote_to_tag`
Negotiation records	`b2b_quote_message`, `b2b_quote_attachment`, `b2b_quote_fee`
Agreements	`b2b_quote_agreement`, `b2b_quote_agreement_item`
Automation	`b2b_quote_pricing_rule`, `b2b_quote_workflow_rule`
Audit history	`b2b_quote_revision`, `b2b_quote_revision_item`

The module also adds quote-related fields to Magento quote, order, invoice, credit memo, and order-grid records.

Post-Installation

1. Enable the extension and choose the quote number format.
2. Review the default quote statuses and allowed transitions.
3. Decide which customer groups may request quotes.
4. Configure the storefront buttons, cart conversion, and mini quote.
5. Check email sender and notification settings.
6. Add pricing rules, workflow automation, PDF branding, or guest quotes only where the business process needs them.

Start with a simple request-review-accept workflow. Add automation after sales users have confirmed that the basic lifecycle matches the way they work.

Next Steps

- Configuration Guide
- Quote Management

Configuration

Configure the B2B Quote extension for your business requirements.

Where Settings Live

All settings are under:

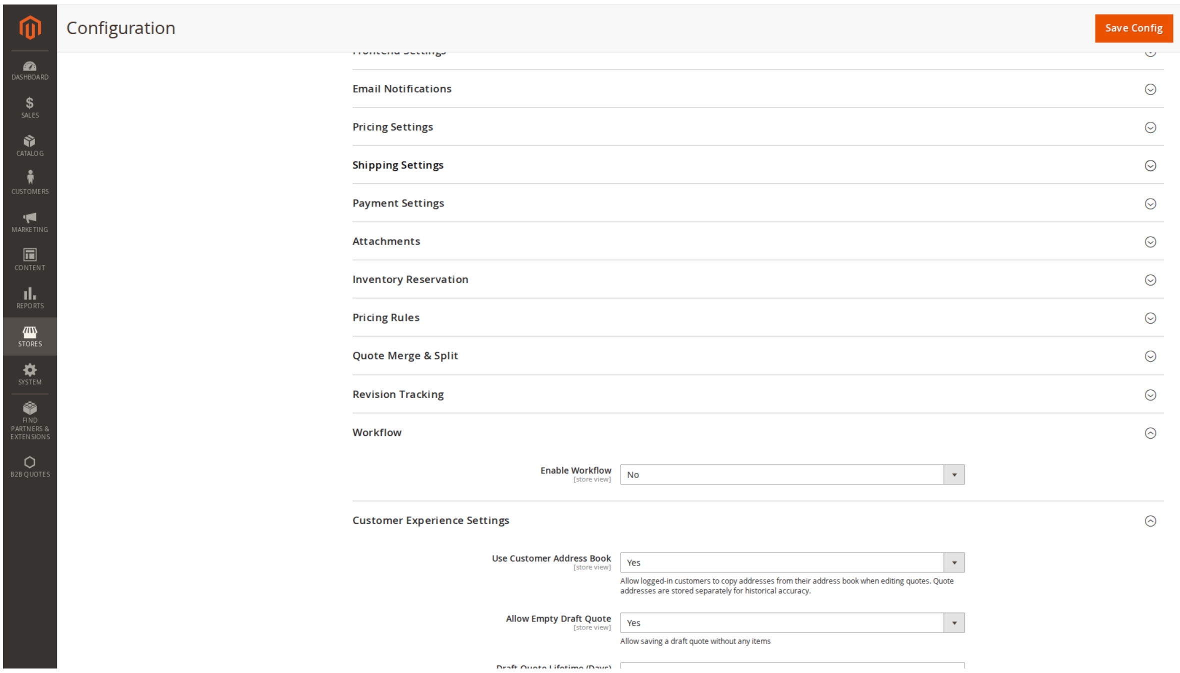
- **Stores > Configuration > MageB2B > B2B Quote**

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)
- `b2bquote/messaging/*` (quote message limits and per-status disabling)
- `b2bquote/admin_assignment/*` (responsible admin and Admin Inbox notices)

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

- Settings Reference



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

Admin Permissions (ACL)

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 > Agreements`	`MageB2B_B2BQuote::agreements`
`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`

Admin Menu	Required ACL
`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
`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`	Parent permission for quote attachments
`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::agreements`	Agreements and call-off quantities
`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

Permission	What It Controls
`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:

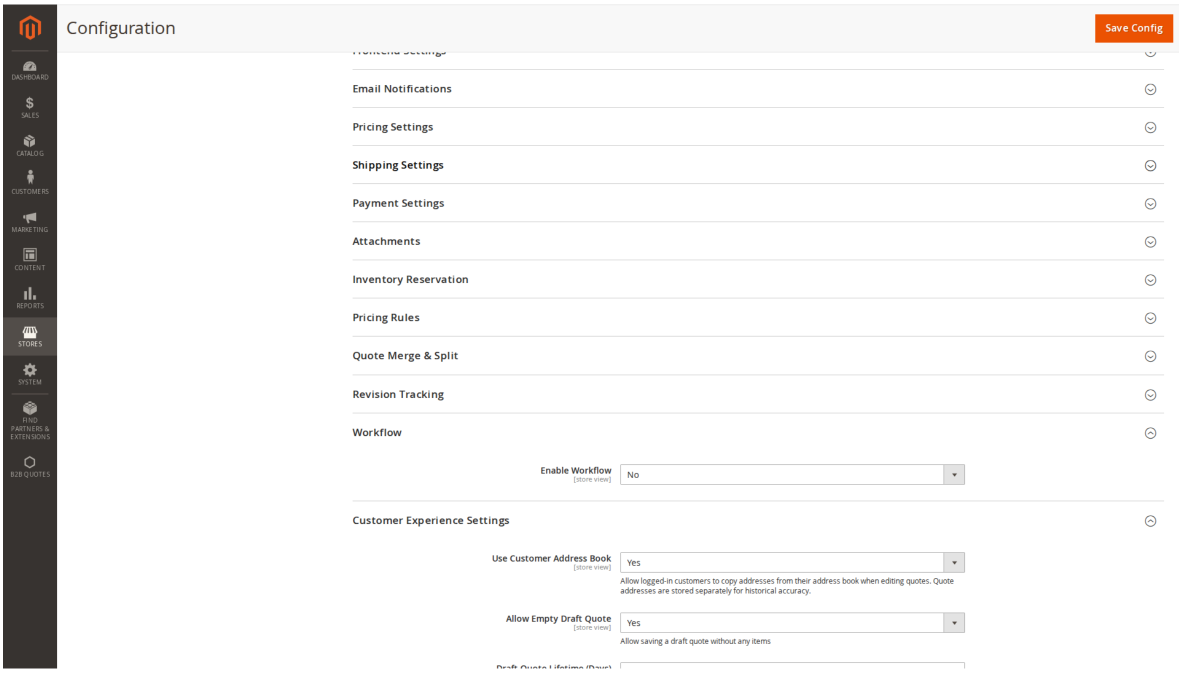
- Prefer `MageB2B_B2BQuote::quotes_view` for read-only integrations
- Add `MageB2B_B2BQuote::quotes_save` only when the integration needs to update quotes

See REST API Add-On for installation, authentication and the complete endpoint reference.

Settings Reference

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

This reference is generated from the module system configuration. Use it as the canonical list of paths and Admin labels. The linked feature pages explain behavior, dependencies, and operational checks.



System Configuration Reference

Generated from the module `etc/adminhtml/system.xml` files so the KB matches the Magento admin configuration structure.

`b2b-quote`

B2B Quote / General Settings (`b2bquote/general/*`)

Config path	Admin label	Type
`b2bquote/general/enable`	Enable B2B Quote	`select`
`b2bquote/general/quote_number_format`	Quote Number Format	`text`
`b2bquote/general/default_status`	Default Quote Status	`select`
`b2bquote/general/default_expiration_days`	Default Expiration Days	`text`

Config path	Admin label	Type
`b2bquote/general/accept_mode`	Accept Mode	`select`
`b2bquote/general/allow_quote_accept_mode_choice`	Allow Customer to Choose Accept Mode	`select`
`b2bquote/general/max_quotes_per_customer`	Maximum Quotes Per Customer	`text`
`b2bquote/general/max_quote_items`	Maximum Quote Items	`text`
`b2bquote/general/max_item_qty`	Maximum Item Quantity	`text`
`b2bquote/general/allowed_customer_groups`	Allowed Customer Groups	`multiselect`
`b2bquote/general/auto_approval_enabled`	Enable Auto-Approval	`select`
`b2bquote/general/auto_approval_threshold`	Auto-Approval Threshold	`text`
`b2bquote/general/clear_cart_after_conversion`	Clear Cart After Conversion	`select`
`b2bquote/general/clear_cart_before_accept_add_to_cart`	Clear Cart Before Accepting Quote to Cart	`select`

B2B Quote / Guest Quote Settings (`b2bquote/guest_quote/*`)

Config path	Admin label	Type
`b2bquote/guest_quote/enabled`	Enable Guest Quotes	`select`
`b2bquote/guest_quote/quote_number_format`	Quote Number Format	`text`
`b2bquote/guest_quote/access_token_pattern`	Access Token Pattern	`text`

B2B Quote / PDF Settings (`b2bquote/pdf/*`)

Config path	Admin label	Type
`b2bquote/pdf/pdf_layout`	PDF Layout	`text`

Config path	Admin label	Type
`b2bquote/pdf/pdf_logo_path`	PDF Company Logo	`image`
`b2bquote/pdf/pdf_company_name`	PDF Company Name	`text`
`b2bquote/pdf/pdf_company_address`	PDF Company Address	`textarea`
`b2bquote/pdf/pdf_company_phone`	PDF Company Phone	`text`
`b2bquote/pdf/pdf_company_email`	PDF Company Email	`text`
`b2bquote/pdf/pdf_footer_text`	PDF Footer Text	`textarea`
`b2bquote/pdf/pdf_download_restricted_statuses`	PDF Download Restricted Statuses	`multiselect`
`b2bquote/pdf/pdf_display_item_notes`	Display Quote Item Notes	`select`

B2B Quote / Frontend Settings (`b2bquote/frontend_settings/*`)

Config path	Admin label	Type
`b2bquote/frontend_settings/button_text`	Add to Quote Button Text	`text`
`b2bquote/frontend_settings/display_on_product`	Display on Product Page	`select`
`b2bquote/frontend_settings/display_on_category`	Display on Category Page	`select`
`b2bquote/frontend_settings/show_in_topnav`	Show in Top Navigation	`select`

Config path	Admin label	Type
`b2bquote/frontend_settings/enable_mini_quote`	Enable Mini Quote	`select`
`b2bquote/frontend_settings/mini_quote_max_display`	Mini Quote Max Quotes	`text`
`b2bquote/frontend_settings/mini_quote_display_mode`	Mini Quote Display Mode	`select`
`b2bquote/frontend_settings/allow_counter_offer`	Allow Counter Offer	`select`
`b2bquote/frontend_settings/show_prices`	Show Prices in Frontend	`select`
`b2bquote/frontend_settings/quote_list_page_size`	Quote List Page Size	`text`
`b2bquote/frontend_settings/redirect_after_product_add`	Redirect to Quote After Product Add	`select`
`b2bquote/frontend_settings/enable_cart_conversion`	Enable Cart to Quote Conversion	`select`
`b2bquote/frontend_settings/cart_conversion_min_amount`	Cart Conversion Minimum Amount	`text`
`b2bquote/frontend_settings/cart_conversion_button_text`	Cart Conversion Button Text	`text`
`b2bquote/frontend_settings/show_history_tab`	Show History Tab	`select`
`b2bquote/frontend_settings/allow_duplicate_quote`	Allow Duplicate Quote	`select`
`b2bquote/frontend_settings/duplicate_copy_fields`	Duplicate Quote: Copy Fields	`multiselect`

B2B Quote / Email Notifications (`b2bquote/email_notifications/*`)

Config path	Admin label	Type
`b2bquote/email_notifications/enabled`	Enable Email Notifications	`select`
`b2bquote/email_notifications/email_sender`	Email Sender	`select`
`b2bquote/email_notifications/admin_recipients`	Admin Recipients	`text`
`b2bquote/email_notifications/template_quote_submitted`	Quote Submitted Template	`select`
`b2bquote/email_notifications/template_counter_offer`	Counter Offer Template	`select`
`b2bquote/email_notifications/template_status_changed`	Status Changed Template	`select`
`b2bquote/email_notifications/template_quote_expired`	Quote Expired Template	`select`
`b2bquote/email_notifications/template_price_negotiated`	Price Negotiated Template	`select`
`b2bquote/email_notifications/template_message_notification`	Message Notification Template	`select`
`b2bquote/email_notifications/template_message_notification_admin`	Message Notification Template (Admin → Customer)	`select`
`b2bquote/email_notifications/email_copy_method`	Send Email Copy Method	`select`
`b2bquote/email_notifications/expiration_reminder_intervals`	Expiration Reminder Intervals	`custom`
`b2bquote/email_notifications/expiration_reminder_enabled`	Enable Expiration Reminder Emails	`select`
`b2bquote/email_notifications/template_expiration_reminder`	Expiration Reminder Template	`select`
`b2bquote/email_notifications/attach_quote_pdf`	Attach Quote PDF	`select`
`b2bquote/email_notifications/attach_customer_files`	Attach Customer Files	`select`

B2B Quote / Pricing Settings (`b2bquote/pricing/*`)

Config path	Admin label	Type
`b2bquote/pricing/negotiation_enabled`	Enable Price Negotiation	`select`

B2B Quote / Quote Fees (`b2bquote/quote_fee/*`)

Config path	Admin label	Type
`b2bquote/quote_fee/apply_tax`	Apply Tax to Quote Fee	`select`
`b2bquote/quote_fee/fee_includes_tax`	Fee Amount Includes Tax	`select`
`b2bquote/quote_fee/tax_class_id`	Tax Class	`select`

B2B Quote / Shipping Settings (`b2bquote/shipping/*`)

Config path	Admin label	Type
`b2bquote/shipping/required`	Shipping Required	`select`
`b2bquote/shipping/free_shipping_threshold`	Free Shipping Threshold	`text`
`b2bquote/shipping/disallowed_methods`	Disallowed Shipping Methods	`multiselect`

B2B Quote / Payment Settings (`b2bquote/payment/*`)

Config path	Admin label	Type
`b2bquote/payment/required`	Payment Required	`select`
`b2bquote/payment/disallowed_methods`	Disallowed Payment Methods	`multiselect`

B2B Quote / Attachments (`b2bquote/attachments/*`)

Config path	Admin label	Type
`b2bquote/attachments/allowed_extensions`	Allowed File Extensions	`text`
`b2bquote/attachments/max_filesize_mb`	Max File Size (MB)	`text`

Config path	Admin label	Type
`b2bquote/attachments/max_attachments_frontend`	Max Attachments (Frontend)	`text`
`b2bquote/attachments/disabled_statuses`	Disable Attachments for Statuses	`multiselect`
`b2bquote/attachments/temporary_file_retention_hours`	Temporary File Retention (Hours)	`text`

B2B Quote / Admin Responsibility (`b2bquote/admin_assignment/*`)

Config path	Admin label	Type
`b2bquote/admin_assignment/mode`	Admin User Quote	`select`
`b2bquote/admin_assignment/admin_inbox_enabled`	Enable Admin Inbox Notifications	`select`

B2B Quote / Messaging (`b2bquote/messaging/*`)

Config path	Admin label	Type
`b2bquote/messaging/max_message_length`	Maximum Message Length	`text`
`b2bquote/messaging/messaging_disabled_statuses`	Disable Messaging for Statuses	`multiselect`

B2B Quote / Inventory Reservation (`b2bquote/inventory/*`)

Config path	Admin label	Type
`b2bquote/inventory/reserve_on_approval`	Reserve Inventory on Approval	`select`
`b2bquote/inventory/reservation_compensation_code`	Reservation Compensation Code	`text`

Config path	Admin label	Type
`b2bquote/inventory/release_on_expiration`	Release Inventory on Expiration	`select`
`b2bquote/inventory/release_on_rejection`	Release Inventory on Rejection	`select`

B2B Quote / Pricing Rules (`b2bquote/pricing_rules/*`)

Config path	Admin label	Type
`b2bquote/pricing_rules/pricing_rules_enabled`	Enable Pricing Rules	`select`
`b2bquote/pricing_rules/can_stack_rules`	Allow Rule Stacking	`select`

B2B Quote / Quote Merge & Split (`b2bquote/quote_merge_split/*`)

Config path	Admin label	Type
`b2bquote/quote_merge_split/merge_enabled`	Enable Quote Merge (Frontend)	`select`
`b2bquote/quote_merge_split/merge_messages_default`	Merge Messages Default	`select`
`b2bquote/quote_merge_split/merge_attachments_default`	Merge Attachments Default	`select`
`b2bquote/quote_merge_split/split_enabled`	Enable Quote Split (Frontend)	`select`
`b2bquote/quote_merge_split/delete_source_after_merge`	Delete Source Quotes After Merge	`select`

B2B Quote / Workflow (`b2bquote/workflow/*`)

Config path	Admin label	Type
`b2bquote/workflow/workflow_enabled`	Enable Workflow	`select`
`b2bquote/workflow/transition_validation`	Workflow Rules Validate Transitions	`select`

B2B Quote / Revision Tracking (`b2bquote/revision/*`)

Config path	Admin label	Type
`b2bquote/revision/enabled_events`	Enabled Revision Events	`multiselect`
`b2bquote/revision/cleanup_enabled`	Enable Revision Cleanup	`select`
`b2bquote/revision/cleanup_days`	Revision Retention Days	`text`

B2B Quote / Customer Experience Settings (`b2bquote/customer_experience/*`)

Config path	Admin label	Type
`b2bquote/customer_experience/use_customer_addressbook`	Use Customer Address Book	`select`
`b2bquote/customer_experience/allow_empty_draft_quote`	Allow Empty Draft Quote	`select`
`b2bquote/customer_experience/draft_lifetime_days`	Draft Quote Lifetime (Days)	`text`
`b2bquote/customer_experience/draft_notice_days_before`	Draft Deletion Notice (Days Before)	`text`
`b2bquote/customer_experience/typical_response_time_days`	Typical Response Time (Business Days)	`text`
`b2bquote/customer_experience/important_information`	Important Information (WYSIWYG)	`editor`
`b2bquote/customer_experience/approval_validity_days`	Approval Validity Period (Days)	`text`

B2B Quote / Order Creation Settings (`b2bquote/order_creation/*`)

Config path	Admin label	Type
`b2bquote/order_creation/price_change_behavior`	Price Change Behavior	`select`
`b2bquote/order_creation/stock_validation_behavior`	Stock Validation Behavior	`select`
`b2bquote/order_creation/product_availability_check`	Check Product Availability	`select`

Cron Jobs

B2B Quote uses Magento's standard `default` cron group for expiration, reminders, draft cleanup, and revision retention. If Magento cron is not running, interactive quote actions still work, but time-based maintenance stops.

Scheduled jobs

Job name	Default schedule	Purpose
`b2bquote_quote_check_expired`	Daily at 02:00	Moves eligible quotes past their validity date into the configured expired-state workflow.
`b2bquote_send_expiration_reminders`	Hourly	Sends reminders for configured intervals before expiry.
`b2bquote_delete_old_drafts`	Daily at 03:00	Deletes draft quotes older than the configured lifetime.
`b2bquote_cleanup_old_revisions`	Daily at 04:00	Removes eligible old revisions when revision cleanup is enabled.
`b2bquote_cleanup_temporary_attachments`	Hourly at minute 15	Deletes abandoned temporary attachment files older than **Temporary File Retention (Hours)** (`b2bquote/attachments/temporary_file_retention_hours`; `0` disables cleanup).

Schedules use the server's cron context. Quote date decisions can also depend on the Magento store timezone, so verify both when a job appears to run on the wrong day.

Required configuration

- Expiration reminders require email notifications, reminder delivery, intervals, and a template.
- Draft cleanup uses the customer-experience draft lifetime. A value of `0` disables lifetime-based deletion.
- Revision cleanup requires **Enable Revision Cleanup** and a positive retention period.
- Expiration processing needs valid expired-state statuses and transitions used by the extension's automated workflow.

Verify Magento cron

From the Magento installation:

```
php bin/magento cron:run --group default
```

Run it a second time when testing newly scheduled work: the first invocation can generate schedules and the next executes jobs that are due. In production, rely on Magento's configured operating-system cron rather than manual runs.

Inspect the `cron_schedule` table for the exact job code and review Magento logs for errors. A row marked `success` proves the job returned successfully; verify the affected quote or email as well.

Troubleshooting sequence

1. Confirm the operating-system cron invokes Magento regularly.
2. Confirm `default` group schedules are being generated and executed.
3. Filter `cron_schedule` by the B2B Quote job code.
4. Check store-scoped feature settings and the quote's dates and status.
5. Review Magento exception and system logs.
6. For reminders, verify mail transport and capture the expected message.
7. For cleanup, use a non-production fixture near the age boundary before enabling deletion on live data.

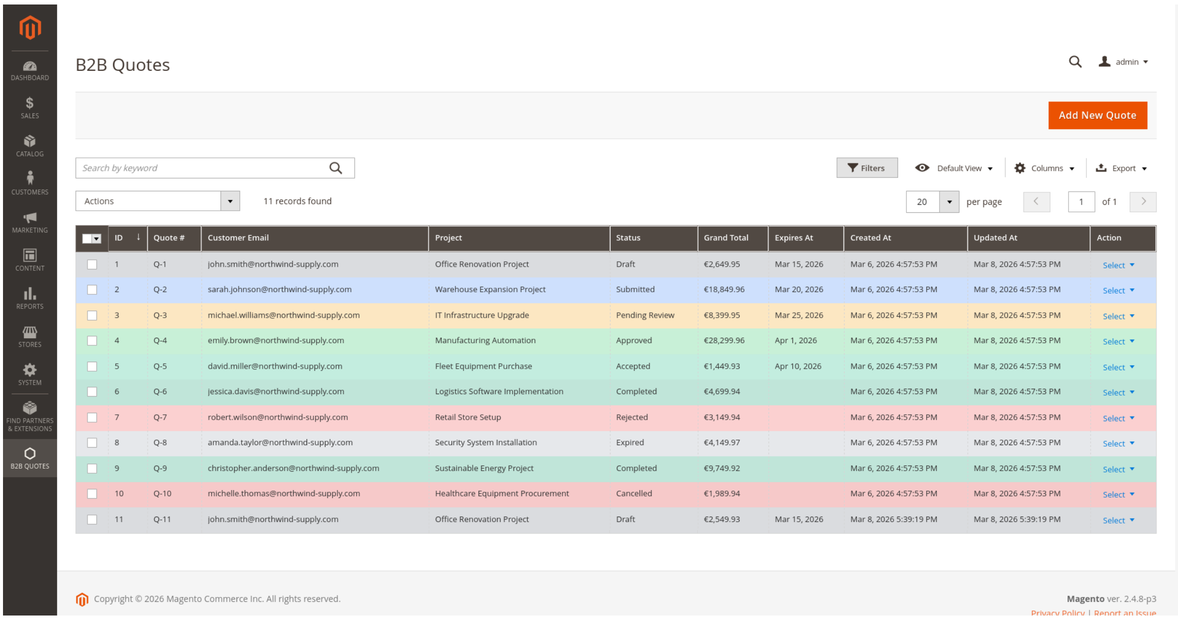
Do not “fix” a missed job by editing quote dates or deleting rows manually. Resolve scheduling or configuration first, then run the supported job.

Related pages

- Email Notifications
- Revision Tracking
- Quote Lifecycle
- Troubleshooting

Quote Management

The quote workspace brings the commercial details of a request into one place: customer, project, products, offered prices, shipping, payment, messages, attachments, and the next permitted workflow status. Use it to prepare an offer that the customer can review and accept without rebuilding the order by hand.



Find and filter quotes

Open **B2B Quotes > Quotes**. The grid shows the fields needed for day-to-day triage:

Column	What it tells you
ID and **Quote #**	Internal ID and customer-facing quote number
Customer Email	Customer or guest contact associated with the request
Project	Optional purchasing project used to organise related quotes
Status	Current configurable workflow status
Grand Total	Current quoted total
Expires At	Date after which the offer is no longer valid
Created At and **Updated At**	When the quote was created and last changed

Each displayed field has an appropriate text, range, select, or date filter. The grid also provides full-text search, saved views, column controls, CSV/XML export, and inline editing where the current workflow permits it.

Use mass actions carefully

Select one or more rows to:

- change their status
- download their PDFs
- delete them
- merge compatible quotes
- assign a responsible admin user

Status changes still pass through the configured transition rules. A merge requires at least two editable quotes for the same customer and must remain within the configured item limit. Review the merge preview before deciding whether messages and attachments should move to the resulting quote.

Assign responsibility for a quote

Each quote can have a responsible administrator. The behaviour is set under **Stores > Configuration > MageB2B > B2B Quote > Admin Responsibility**:

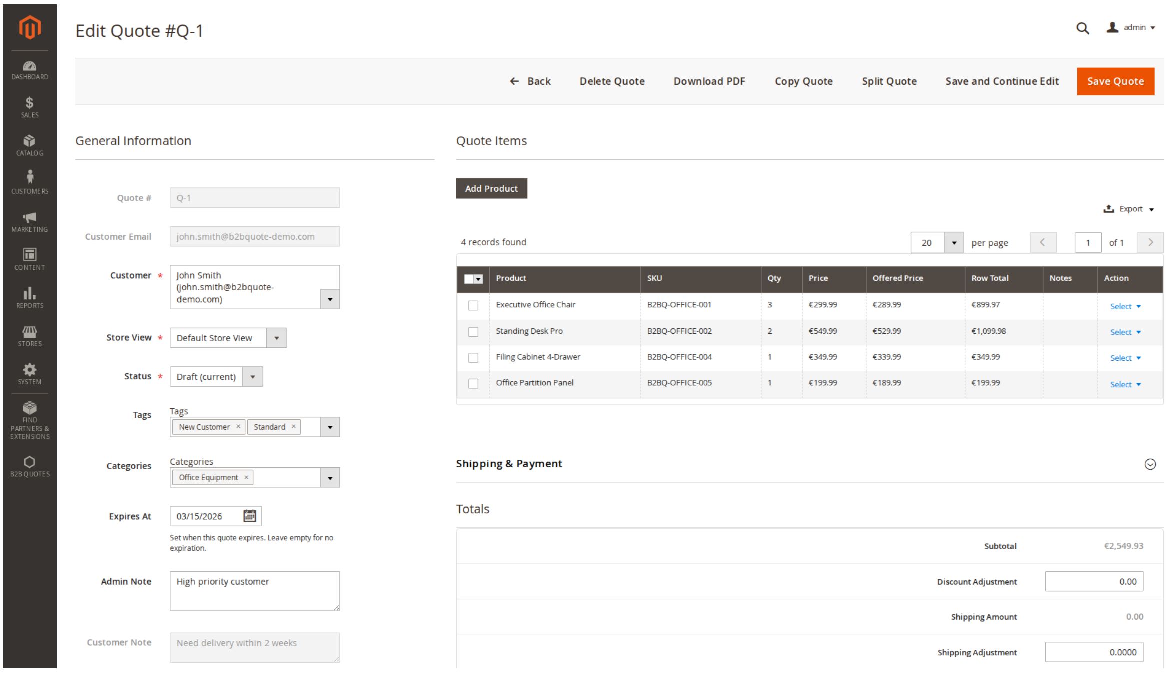
- **Admin User Quote** — with **Currently Working On**, the last administrator who edited the quote is treated as responsible. With **Assigned**, the quote form exposes an **Assigned Admin User** field and responsibility is set explicitly.
- **Enable Admin Inbox Notifications** — adds Magento Admin Inbox notices when customers change a quote status or send a message, so the responsible admin sees it without checking email.

In the grid, the **Admin User** column shows the current owner and the **Assign Admin User** mass action reassigns several quotes at once.

Review and edit a quote

Open a row from the grid. The edit screen includes the following working areas:

- customer and store view
- status, project, tags, and categories
- expiration date and internal note
- the customer's original note
- quote items and offered prices
- shipping, payment, purchase order number, and quote fee
- calculated totals and manual adjustments
- attachments and the message thread



The buttons shown at the top depend on the quote state and the administrator's permissions. Available actions can include **Save**, **Save and Continue**, **Convert to Order**, **Create Agreement**, **PDF**, **Copy**, **Split**, and **Delete**.

Add products and prepare the offer

1. Open the quote and select **Add Products**.
2. Find the required products and enter their quantities.
3. Review the original product price and enter the offered price or adjustment required for the deal.
4. Add item notes where the customer needs an explanation, substitute, lead time, or packaging detail.
5. Choose shipping and payment options after the relevant address data is complete.
6. Review taxes, shipping, fees, discounts, and the grand total before saving.

The totals section distinguishes calculated amounts from commercial adjustments. A shipping adjustment can be positive or negative; the grand total is recalculated from the item subtotal, discount adjustment, shipping, shipping adjustment, quote fee, and tax.

Save the quote in this order when troubleshooting an editor change:

1. customer, project, status, and expiration;
2. item additions, quantities, options, offered prices, and notes;
3. billing and shipping addresses;
4. shipping method, shipping adjustment, payment method, PO number, and fee;
5. totals, messages, attachments, categories, and tags.

The editor revalidates the quote while saving. A locked or terminal quote can show its data without accepting a commercial edit. If revision tracking is enabled, the committed change can create a revision after the save. Refresh the quote before comparing a revision or running a second action.

Edit many items with CSV

The quote editor's item-level bulk tool exports and imports a compact CSV using `sku`, `qty`, `price`, and `notes`. This is useful for preparing a large individual offer in a spreadsheet.

It is separate from the optional CSV Import/Export Add-On, which moves complete quote-related entities such as quotes, addresses, messages, projects, statuses, transitions, categories, tags, and fees.

Change the workflow status

Choose a status that is valid from the quote's current status. The extension checks the transition, actor, store, and any required note before applying it. For example, approval is normally available only for a submitted quote; rejection can be available for submitted or approved quotes when the workflow permits it.

If the status is unavailable or rejected, inspect Status Transitions rather than forcing the database value. Workflow rules may add further conditions.

Communicate with the customer

Use the message section for quote-specific questions, explanations, and negotiation history. Messages are attached to the quote and can trigger the configured email notification. Attachments are uploaded immediately and associated with the current quote, so check the file and recipient context before sending a message.

Keep internal-only information in **Admin Note**. The **Customer Note** displays the customer's submitted note and is read-only in the administrator form.

Convert an accepted quote to an order

Use **Convert to Order** only after the quote has reached an eligible state and its customer, addresses, products, prices, shipping, and payment data have been reviewed. The conversion revalidates product availability and pricing according to the configured order-creation policies.

If conversion returns an error, first check whether an order was already created before retrying. See Cart and Order Conversion for the conversion modes and validation settings.

The administrator order action uses the same product, price, stock, address, shipping, payment, expiration, and transition checks as the customer flow. Changing the status in the grid is not a substitute for conversion: an `ordered` state without an order should be treated as an operational incident and investigated in the logs and quote history.

Copy, split, or merge

- **Copy** creates a new quote from an existing one when a similar offer is needed.
- **Split** distributes selected item groups into new quotes.
- **Merge** combines compatible quotes for the same customer and can optionally carry messages and attachments forward.

These operations are permission-controlled and can be limited in configuration. See Merge & Split before using them on active negotiations.

Generate a PDF

Use **PDF** on the quote or **Download PDF** on selected grid rows. Availability can depend on the quote's current status and PDF configuration. The optional PDF Designer add-on supplies custom layouts; it is not required for the standard quote PDF.

See PDF Export & Layouts and PDF Designer Add-On.

Related guides

- Admin Permissions
- Quote Lifecycle
- Projects, Categories, Tags, and Fees
- Revision Tracking
- Analytics Dashboard

Quote Statuses

Quote statuses give your team useful business labels without changing the underlying quote lifecycle. For example, two quotes can both be **In Review** at system level while one is labelled **Technical Review** and the other **Waiting for Purchasing**.

Open **B2B Quotes > Quote Statuses** to view or maintain them.

States and statuses are different

A **state** is a fixed lifecycle stage used by the extension. A **status** is the store-scoped label assigned to one of those states.

The available states are:

State	What it means
Draft	The quote is still being prepared.
Submitted	The customer has sent the request.
In Review	The merchant or customer is working on the offer.
Approved	The merchant has released an offer for the customer.
Accepted	The customer has accepted the offer.
Ordered	The quote has been converted into an order.
Rejected	The current offer was declined; the quote can still continue through a configured transition.
Expired	The quote is no longer valid.
Cancelled	The quote was cancelled.

`Ordered`, `Expired`, and `Cancelled` are final states. Do not create a status expecting it to add a new lifecycle state: custom statuses must always map to one of the states above.

Create a status

1. Select **Add New Status**.
2. Choose the **Store View** that should use the status. Use **All Store Views** for a global status.
3. Select its fixed **State**.
4. Enter a unique **Status Code** and a clear **Label**.
5. Decide whether it is the **Default for State**.
6. Set its position, colour, and optional guidance text.

7. Save the status, then create the transitions that lead into and out of it.

Field reference

Field	Purpose
Store View	Limits the status to one store view or makes it global.
State	Connects the status to a fixed lifecycle stage.
Status Code	Stable internal identifier used by rules and integrations.
Label	Text shown to administrators and customers.
Default for State	Makes this the status selected when the extension enters that state and no more specific target is requested.
Sort Order	Controls where the status appears in lists; lower numbers appear first.
Colour	Helps people recognise the status in quote screens and grids.
Guidance Text	Optional next-step guidance shown with the status. Keep it short and actionable.

There is no separate **Active** switch. If a status should no longer be used, first remove or replace transitions and rules that refer to it, then delete it only after checking existing quotes.

A practical example

Suppose submitted quotes need a commercial check before a specialist reviews the products. You can create two statuses under the **In Review** state:

- **Commercial Review** — default for the state, guidance: “Check customer terms and requested quantities.”
- **Technical Review** — guidance: “Confirm product suitability and delivery requirements.”

The labels help the team understand the next task, while the extension still treats both quotes as being in review. Define the allowed path between them on the Status Transitions page.

Before changing a live workflow

- Keep one default status for every state you use.
- Use short, stable codes; change the customer-facing label instead of repeatedly renaming a code.

- Check pricing rules, workflow rules, email templates, API integrations, and existing transitions before deleting a status.
- Use guidance text for the next action, not for long policy documents.
- Test the customer and administrator paths in a non-production store view first.

Related pages

- Quote Lifecycle
- Status Transitions
- Workflow Rules
- Quote Management

Projects, Categories, and Tags

B2B Quote provides three lightweight ways to organise work. A project belongs to one customer and groups related quotes. Categories and tags classify quotes across customers. They do not assign a sales representative, track a project budget, or replace a CRM.

Tool	Best used for	Example
Project	A customer's longer purchasing initiative	`Berlin Office Expansion`
Category	Stable internal classification	`Office Furniture`
Tag	Flexible operational marker	`Needs Technical Review`

Projects

A project has a customer, name, description, and active flag. Customers can create and select their own projects while preparing quotes; administrators can maintain projects in **B2B Quotes > Projects**.

Use a project when several quote requests belong to the same customer initiative. A quote stores one project reference. Deactivating a project prevents normal future selection without deleting the quotes already associated with it.

See Projects.

Categories

A category has a unique code, display name, optional description, active flag, and sort order. A quote can have multiple categories.

Categories are a good fit for classifications that change rarely, such as product division, request type, or internal team. Their codes are integration identifiers; choose them carefully and avoid changing them casually after an API or import process depends on them.

See Quote Categories.

Tags

A tag has a unique code, display name, and active flag. A quote can have multiple tags.

Tags work well for short-lived or cross-cutting markers, such as `Tender`, `Renewal`, or `Urgent Delivery`. Create a controlled set in **B2B Quotes > Quote Tags**, then select those tags on the quote. The admin form does not accept an arbitrary comma-separated string as a replacement for tag records.

See Quote Tags.

Choose a simple convention

- Use human-readable names for administrators and customers.
- Use lowercase ASCII codes with underscores or hyphens consistently for API/import identifiers.
- Do not put customer names or confidential deal details in global category or tag names.
- Deactivate a value that should no longer be selected; delete it only after checking existing relations and integrations.
- Prefer a small useful taxonomy over dozens of nearly identical values.

Automation and data exchange

Pricing and workflow rules expose quote/category-related conditions where supported by the selected condition type. Verify the exact rule condition instead of assuming every field can drive every rule.

The optional REST API and CSV Import/Export add-ons provide programmatic access to projects, categories, tags, and their quote relations. Use stable codes and customer identifiers when moving this data between environments.

Related guides

- Quote Management
- Pricing Rules
- Workflow Rules
- REST API Add-On
- CSV Import/Export Add-On

Agreement Management

Agreement management is available in the Magento admin under **B2B Quotes > Agreements**.

Agreement Grid

The grid lists agreement records and provides search, filters, pagination, and mass delete.

Common columns:

Column	Description
ID	Internal agreement ID
Agreement #	Public agreement number, for example `AGR-000123`
Customer Email	Agreement owner
Name	Agreement name
Status	Active, inactive, exhausted, or expired
Source Quote	Quote that created the agreement
Valid Until	End date for the agreement

Create An Agreement

Admins can create an agreement manually with **Add New Agreement**.

Required data:

- customer
- name
- status

Optional data:

- project
- source quote
- valid from / valid until
- internal notes

The agreement number is generated after the first save if no number exists yet.

Convert A Quote Into An Agreement

Eligible customer quotes can be converted into agreements.

The conversion copies quote items into agreement items and stores:

- agreed quantity from quote item quantity
- agreed price from offered price, with item price as fallback
- source quote relation
- project relation
- store scope
- quote notes on agreement items

Only quotes in eligible workflow states can be converted. See Agreements & Call-Offs.

Agreement Items

Agreement items define what the customer can call off later.

Each item contains:

- product / SKU / name
- agreed quantity
- consumed quantity
- agreed price
- optional validity dates
- notes

Admins can add products to an agreement and update quantity or price as long as the new agreed quantity is not below the already consumed quantity.

Customer Account Integration

Customers see agreements in **My Account → My Agreements**.

The detail page shows:

- agreement metadata
- source quote link
- project link if available
- item quantities
- call-off quantity inputs

When a customer starts a call-off, the extension creates a new draft quote linked to the agreement.

Access Control

The admin ACL resource is:

```
MageB2B_B2BQuote::agreements
```

Grant this permission to admin roles that should manage agreements.

Related

- Agreements & Call-Offs
- Quote Management
- Projects
- Admin Permissions

Quote Categories

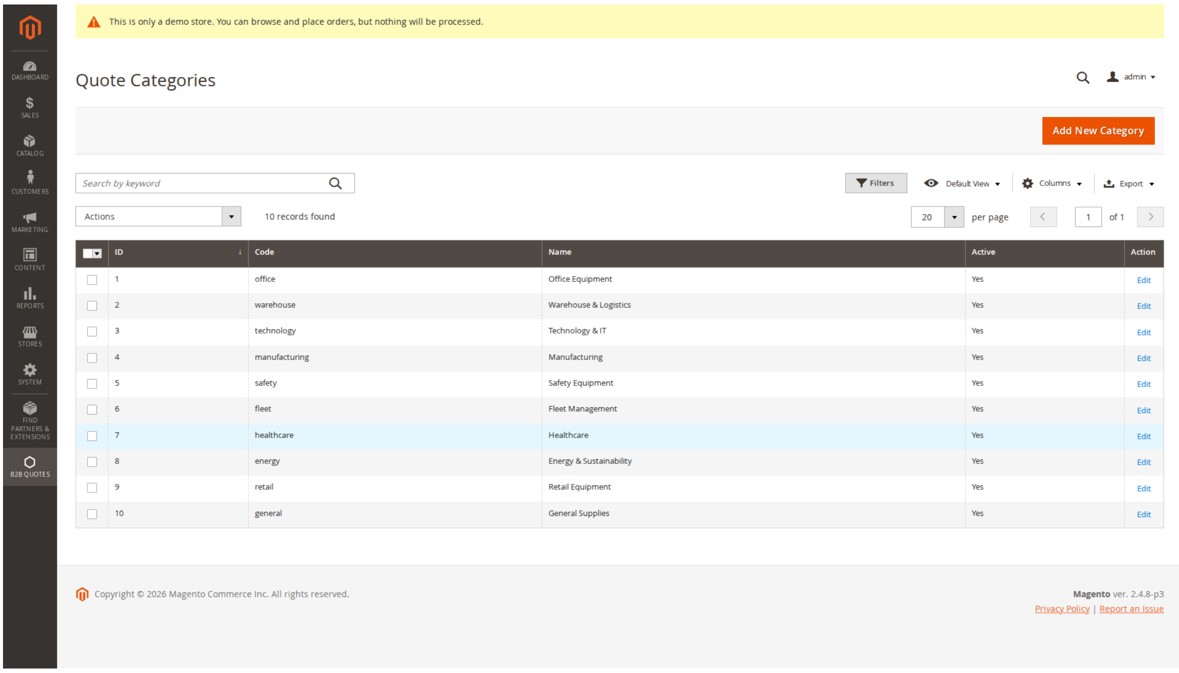
Categories classify quotes with a controlled, reusable vocabulary. A quote can carry more than one category, making categories suitable for stable groupings such as product division, request type, or internal responsibility.

Create a category

Open **B2B Quotes > Quote Categories** and select **Add New Category**.

Field	Meaning
Code	Unique identifier used by APIs and imports
Name	Label shown to administrators
Description	Optional explanation of when to use the category
Active	Whether the category can be selected
Sort Order	Position in category selections

Use a stable ASCII code such as `office_furniture` and a natural display name such as `Office Furniture`. The code is not a translated label.



Assign categories to a quote

Open a quote in Magento Admin, select one or more entries in **Categories**, and save. Only categories available to the form should be used; creating a new text value directly in the quote is not the category workflow.

Maintain the category set

- Deactivate a category that should remain in historical data but should no longer be selected.
- Use tags for temporary campaign or handling markers.
- Check pricing/workflow condition selectors before promising that a new category controls automation.
- Keep codes unchanged once integrations or CSV files use them.

The grid supports mass enable, disable, and delete actions. Review selected records and existing quote relations before deleting.

API and CSV access

The REST add-on exposes category and quote-category endpoints. The CSV add-on provides category import/export and quote-category relation data. See REST API Add-On and CSV Import/Export Add-On.

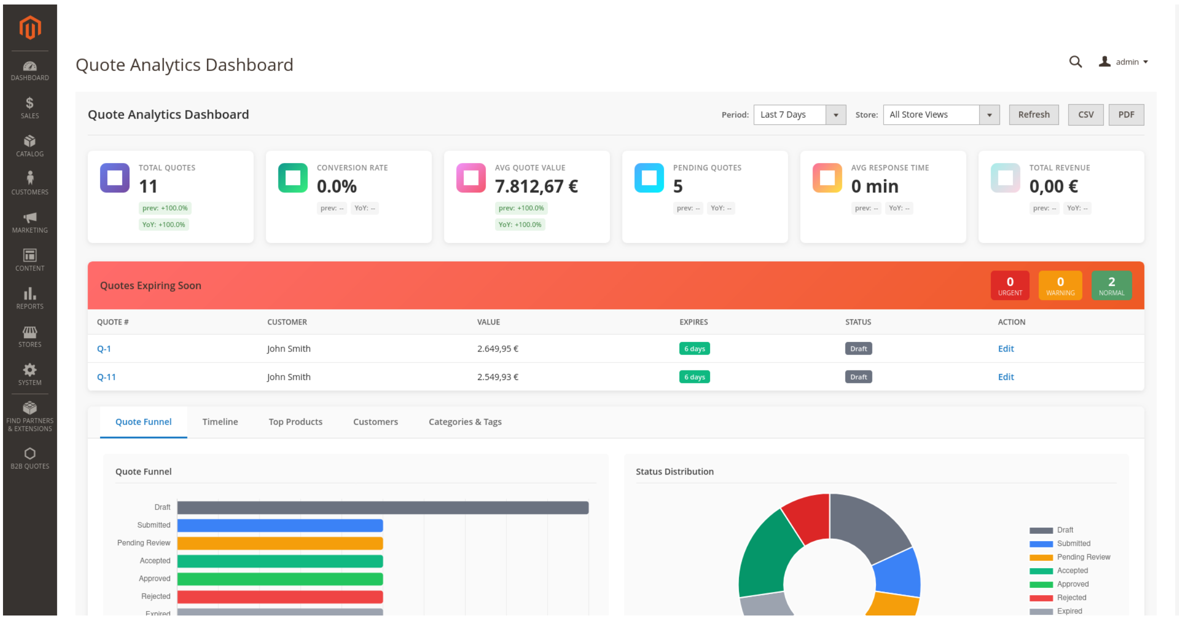
Related guides

- Projects, Categories, and Tags
- Quote Tags
- Quote Management

Quote Analytics Dashboard

The dashboard turns quote activity into a quick operational view. Use it to see how requests move through the pipeline, which offers are close to expiry, and where quote volume and value are concentrated.

Open **B2B Quotes > Analytics Dashboard**.



Filter the data first

Choose a period and, when needed, a store view. The dashboard also supports a custom date range. Filters apply to the KPI cards, charts, tables, drill-down results, and exports, so confirm them before comparing figures.

What the dashboard shows

Summary figures

The KPI area summarises quote activity for the selected period. Use it for direction and trend checks, then open the underlying quotes when a number needs investigation.

Quotes expiring soon

The expiry panel groups upcoming expirations into urgent, warning, and later windows covering the next seven days. The list links the date risk back to individual quotes so the sales team can act before an offer lapses.

Funnel and status distribution

The funnel shows quote counts by lifecycle state. Selecting a funnel segment opens a drill-down list with the quote number, customer, value, date, status, and a link to the quote.

Timeline and revenue

The timeline compares created and converted quotes over time and displays the associated revenue trend. Use it to distinguish a change in request volume from a change in conversion.

Products

The product view shows the most frequently quoted products and product conversion rates. It can reveal high-interest products that rarely reach an order.

Customers

The customer view lists top customers and breaks activity down by customer group. This is useful when reviewing account engagement or whether a B2B segment is using the quote channel.

Categories and tags

These charts show category distribution, tag distribution, and quote value by category. Their usefulness depends on consistent category and tag assignment.

Exporting dashboard data

Use **Export CSV** for further analysis and **Export PDF** for a shareable snapshot. The export uses the active period and store filter. An administrator needs the separate dashboard export permission.

Permissions

Magento roles can separate access to the dashboard from access to export its data:

- `MageB2B_B2BQuote::dashboard_view` — view dashboard data;
- `MageB2B_B2BQuote::dashboard_export` — export CSV or PDF.

See Admin Permissions.

Reading the numbers responsibly

- Compare like-for-like periods and store views.
- Remember that a created quote and a converted quote can fall in different reporting periods.
- Treat low-volume conversion percentages cautiously.
- Keep status, category, and tag usage consistent before using them for management reporting.
- Use drill-down results to validate an unusual chart value instead of assuming the

cause.

If a panel is empty

Check the period and store filters first. Then confirm that quotes in that scope contain the data needed by the panel—for example, expiration dates for the expiry list or category/tag assignments for those charts. Finally, verify that the administrator role has dashboard access and inspect the Magento browser console and logs for failed dashboard requests.

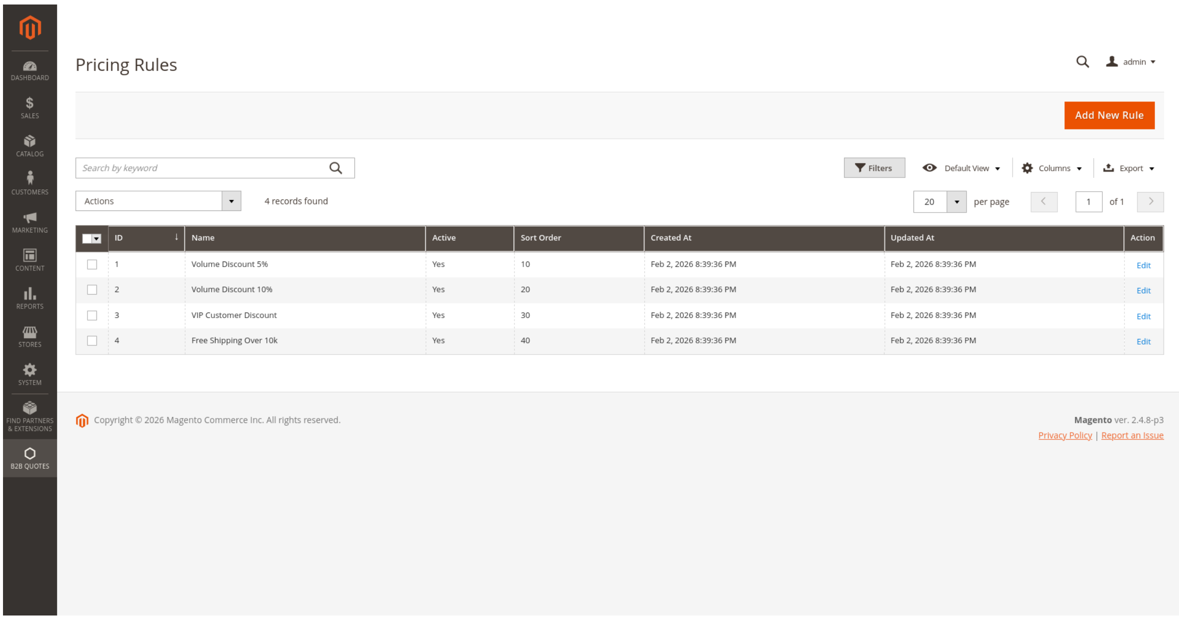
Related pages

- Quote Management
- Categories
- Tags
- Admin Permissions

Pricing Rules

Pricing rules apply repeatable quote discounts when defined conditions match. They are useful when a pricing policy can be expressed consistently—for example, a percentage discount for a customer group once the quote reaches a minimum subtotal.

Open **B2B Quotes > Pricing Rules**.



What a rule contains

Every rule has four parts:

1. **Name** — a clear internal description.
2. **Active** — whether the rule can be evaluated.
3. **Sort Order** — its priority; lower numbers are evaluated first.
4. **Conditions and Actions** — when the rule matches and what pricing change it makes.

Available conditions

Conditions can be combined into groups using **all** or **any** logic. The rule builder supports:

- quote totals, total quantity, number of items, and customer ID;
- customer group;
- product attributes and product combinations.

Use the narrowest conditions that describe the policy. A rule with no meaningful restriction can affect every eligible quote.

Available pricing actions

The action builder can:

- discount the original price by a percentage;
- subtract a fixed amount;
- adjust the price to a percentage of the original price;
- adjust the price to a fixed amount;
- set shipping to free.

Check the wording of the selected action carefully. “Fixed amount discount” subtracts a value, while “adjust price to fixed amount” sets the resulting price.

Create and test a rule

1. Select **Add New Pricing Rule**.
2. Give the rule a name that states both the audience and the outcome.
3. Leave it inactive while building and testing it.
4. Set the sort order.
5. Build the condition tree.
6. Add the pricing action.
7. Save, test with a representative quote, and inspect line prices, discount totals, tax, shipping, and the grand total.
8. Activate the rule only after the result is correct.

For example: **Wholesale — 8% above 2,500** can require the Wholesale customer group and a quote subtotal of at least 2,500, then apply an 8% discount.

Multiple matching rules

The global **Can Stack Rules** setting determines whether more than one matching pricing rule can contribute to a quote. It is disabled by default.

When stacking is disabled, sort order becomes especially important: the first applicable rule wins. When stacking is enabled, test combinations deliberately so two individually reasonable rules do not create an unintended total discount.

See Settings Reference for the configuration location.

Safe operating practices

- Give every rule an owner and a business reason outside Magento.
- Avoid overlapping conditions unless the combined outcome is intentional.
- Test boundary values, such as one cent below and exactly at a subtotal threshold.
- Test simple, configurable, and quantity-heavy quotes when product conditions are involved.

- Re-test tax-inclusive pricing and free shipping after changing Magento tax or shipping configuration.
- Review active rules after customer-group or catalogue changes.

When a rule does not apply

Check, in order:

1. the rule is active;
2. the quote data actually satisfies every condition in an **all** group;
3. the customer belongs to the expected group;
4. the targeted product attributes are populated on the quoted products;
5. a lower sort-order rule did not win while stacking is disabled;
6. quote totals were recalculated after the relevant data changed.

Related pages

- Pricing Rules Explained
- Quote Management
- Quote Fees
- Settings Reference

Projects

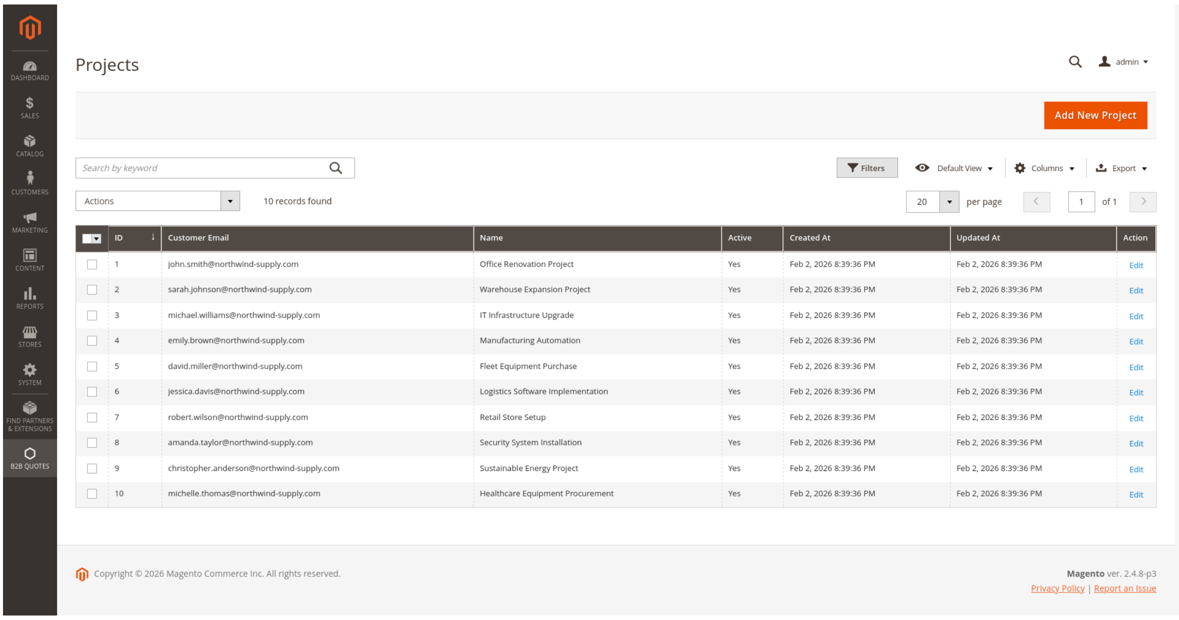
Projects keep several quote requests for the same customer together. For example, a buyer can create `Q4 Warehouse Refit` and use it for separate shelving, safety equipment, and office-furniture quotes.

Create a project in Magento Admin

Open **B2B Quotes > Projects** and select **Add New Project**.

Field	Meaning
Customer	Owner of the project; required
Name	Customer-facing project name; required
Description	Optional context for the purchasing initiative
Active	Whether the project remains available for selection

Save the project, then select it on a quote belonging to the same customer. The grid shows ID, customer email, name, active state, and created/updated dates.



Customer workflow

An authenticated customer can create a project from the storefront project area and select one while creating or editing an eligible quote. Project access is customer-owned: a buyer must not be able to attach a quote to another customer's project.

What projects do not contain

The current project record does not contain budget, start date, deadline, external reference, project status, assigned administrator, or calculated project total fields. Store those values in the owning business system if the implementation needs them; do not rely on undocumented database fields.

Deactivate or delete?

Deactivate a project when it should remain part of quote history but should not be selected for new work. Before deleting one, review its related quotes and agreements. Deletion should not be used as a substitute for closing a purchasing initiative in another system.

Import and export

The optional CSV add-on provides the `b2bquote_projects` entity and the command:

```
php bin/magento b2bquote:import-projects \
  var/import/b2bquote_projects.csv \
  --behavior=append \
  --delete_file_after_import=0
```

Use the customer email expected by the installed entity format and start with a small file. See CSV Quote Import/Export Add-On.

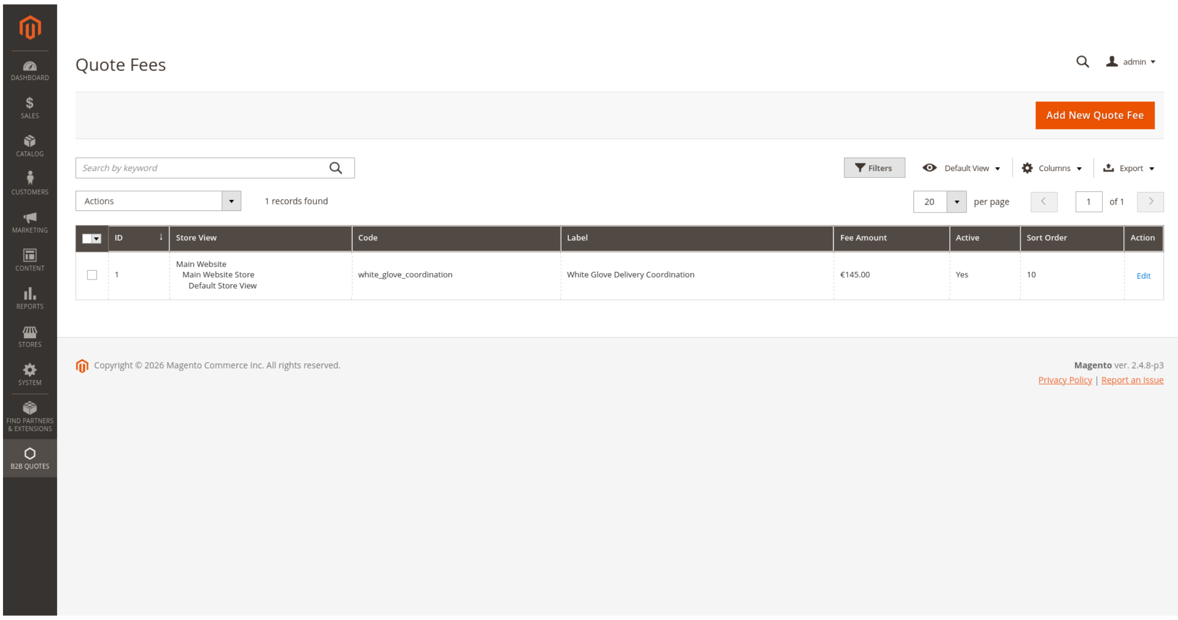
Related guides

- Projects, Categories, and Tags
- Quote Management
- Agreements and Call-Offs

Quote Fees

Quote fees are named fixed charges that can be added to a quote—for example, special packaging, expedited handling, or a documentation fee. Create the reusable fee first, then assign it manually or through a workflow rule.

Open **B2B Quotes > Quote Fees**.



Create a fee

1. Select **Add New Quote Fee**.
2. Choose **All Store Views** or one specific store view.
3. Enter a unique lowercase **Code** using letters, numbers, and underscores.
4. Enter the customer-facing **Label**.
5. Enter the fixed **Fee Amount**.
6. Set **Active** to Yes and choose the sort order.
7. Save, then apply the fee to a test quote.

Field reference

Field	Purpose
Store View	Controls where the fee is available.
Code	Stable internal identifier. Use lowercase letters, numbers, and underscores.
Label	Description shown in quote and order totals.

Field	Purpose
Fee Amount	Fixed amount of the fee in the applicable store currency.
Active	Makes the fee available for assignment.
Sort Order	Controls its position in selectable lists.

Tax configuration

The extension provides three related settings:

- **Apply Tax** — includes the fee in tax calculation.
- **Fee Includes Tax** — treats the configured amount as tax-inclusive and extracts the tax portion.
- **Tax Class** — selects the tax class used for the fee.

If tax is enabled, test the fee with the actual customer groups, countries, tax rates, and display settings used by the store. A correct result in one jurisdiction does not prove the same configuration for another.

Where the fee goes

When a quoted offer becomes an order, the fee and its tax amounts are carried into the order totals. The extension also accounts for those values when invoices and credit memos are created. Always verify partial invoicing and refunds if your operation uses them.

Manual and automated assignment

An administrator can select a fee while preparing a quote. A Workflow Rule can also set or clear a fee when an event and its conditions match.

Use one method as the clear source of truth for each fee. If both a person and an automation rule can change it, document when the rule runs so the result is not surprising.

Before activating a fee

- Use a label customers can understand on a purchasing document.
- Confirm whether the amount is tax-inclusive or tax-exclusive.
- Test quote, order, invoice, and credit-memo totals.
- Test currency and store-view scope where applicable.
- Confirm the fee is not already represented as shipping, a product line, or another surcharge.

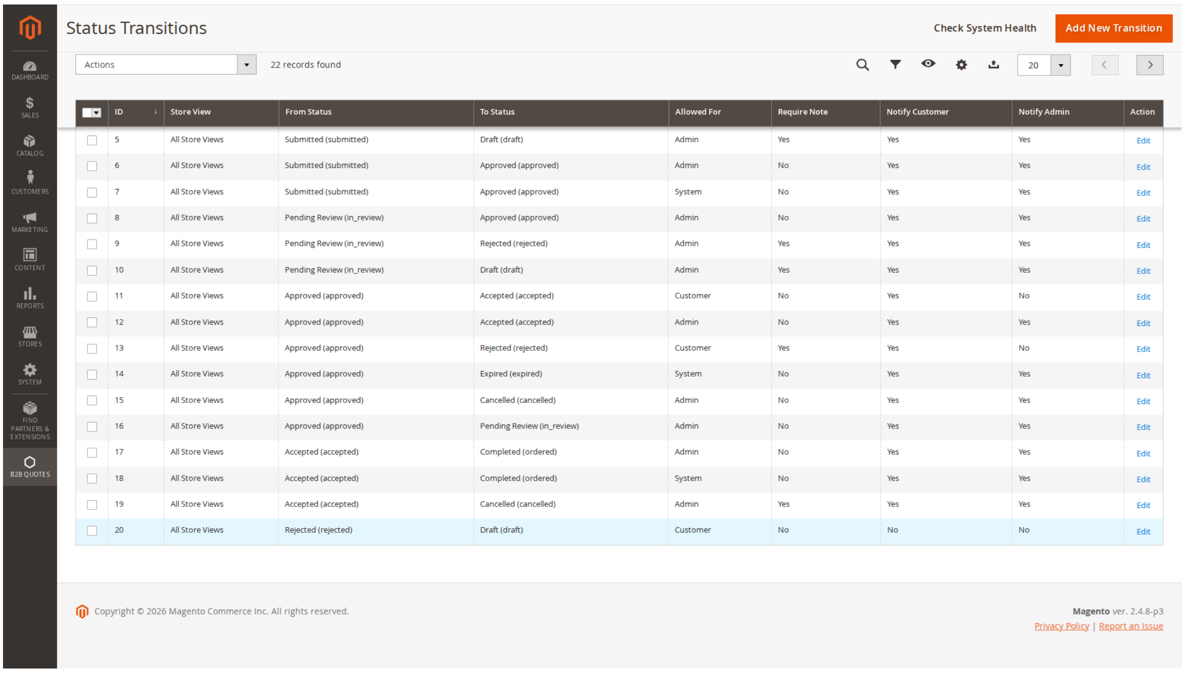
Related pages

- Workflow Rules
- Quote Management
- Settings Reference

Status Transitions

A status transition is one permitted step from a source status to a target status. It answers three practical questions: who may make the change, whether they must leave a note, and who should be notified afterwards.

Open **B2B Quotes > Status Transitions**.



Create a transition

1. Select **Add New Transition**.
2. Choose the relevant **Store View**.
3. Select the **From Status** and **To Status**.
4. Choose who may use it: **Customer**, **Admin**, **Both**, or **System**.
5. Decide whether a note is required.
6. Choose the customer and administrator notification options.
7. Select an email template when the transition should send a notification.
8. Save and test the transition as the intended actor.

Field reference

Field	Purpose
Store View	Applies the transition globally or to a specific store view.
From Status	Current status required before the change.

Field	Purpose
To Status	Status reached after the change.
Allowed For	Limits the action to the customer, an administrator, both, or an automated system process.
Require Note	Prevents the change until the actor provides a reason or comment.
Notify Customer	Sends the configured transition notification to the customer.
Notify Admin	Sends the configured transition notification to the administrator recipient.
Notification Template	Email template used for this transition.

Example approval path

A straightforward merchant-led flow can use these transitions:

From	To	Allowed for	Require note	Typical use
Submitted	Pending Review	Admin	No	A sales user starts reviewing the request.
Pending Review	Approved	Admin	No	The offer is ready for the customer.
Approved	Accepted	Customer	No	The customer accepts the offer.
Approved	Rejected	Customer	Yes	The customer declines and explains why.
Accepted	Completed	System	No	Quote-to-order processing completes the workflow.

The names in your installation may differ because transitions point to configurable statuses, not directly to labels in this example.

Common configuration problems

The expected action is missing

Confirm that a transition exists from the quote's current status and that **Allowed For** includes the person performing the action. Also check the store view: a transition created for another store does not automatically apply here.

“Invalid transition” appears

The target status is not reachable from the current status for that actor. Do not work around this by adding every possible transition. Add the exact business path you want and test it from the real starting status.

A note is requested unexpectedly

Open the matching transition and review **Require Note**. More than one transition can lead to the same target, so check the current source status as well.

No email is sent

Verify the relevant notification checkbox, the selected email template, Magento email delivery, and the configured recipient. A status change alone does not guarantee that both parties are notified.

Design guidance

- Start with the shortest workflow that matches how your sales team actually works.
- Use **System** only for transitions performed by automation, such as expiry or quote-to-order processing.
- Require notes for decisions that need an audit trail, such as rejection or cancellation.
- Avoid duplicate transitions for the same store, source, target, and actor.
- After changing a live workflow, test customer actions, administrator actions, notifications, and automated rules.

Related pages

- Quote Statuses
- Quote Lifecycle
- Workflow Rules
- Troubleshooting

Status and actor matrix

B2B Quote separates a fixed lifecycle state from the store-scoped status label shown in the admin and storefront. The transition table decides which actor may move a quote and whether a note or notification is required.

Lifecycle states

State	Typical meaning	Usual actor for entry
Draft	Request is being prepared.	Customer or admin
Submitted	Customer sent the request for review.	Customer
In review	Merchant or customer is working on the offer.	Admin or customer
Approved	Merchant released an offer.	Admin
Accepted	Customer accepted the offer.	Customer or permitted admin flow
Ordered	An order was created.	System
Rejected	The current offer was declined.	Admin or customer, when configured
Expired	The expiry process closed the offer.	System
Cancelled	The request was cancelled.	Actor allowed by the transition

Ordered, expired, and cancelled are terminal states in the base lifecycle. Custom statuses still map to one of these states and cannot create a separate state.

Operation matrix

The table describes the normal requirement. A store can narrow it with transitions, ACL, customer-group access, status restrictions, and workflow rules.

Operation	Customer	Admin	System
Create draft	Yes, for an eligible account	Yes, with quote-save permission	No
Add or edit items	Editable customer quote	Editable quote and ACL	Through configured jobs or integrations

Operation	Customer	Admin	System
Submit	Requires customer transition	Can save, but submission is an actor-specific transition	No
Offer or approve	No	Requires admin transition and ACL	Workflow rules may trigger related actions
Counter-offer	Only when enabled for the current state	Can set the offered price	No
Accept	Requires customer transition or guest token permission	Only where the admin action is exposed	Conversion performs the system transition
Expire	No	No direct customer action	Expiry job and system transition
Create order	No direct order service call	Admin conversion action where available	Validates and writes the order

Guest access follows the customer column but uses the quote access token. A token does not bypass status, expiry, configuration, or order validation.

Store scope and defaults

Statuses and transitions can be global or scoped to a store view. The resolver uses the quote's store when it looks for a target status and actor permission. Keep one default status for every state used by the workflow. If a target is not explicitly configured, the state default is used; if neither exists, the action fails with an invalid-transition error.

Required notes and notifications

A transition can require a non-empty note. Customer and administrator notifications are independent settings on the transition. A successful status save dispatches side effects after the transaction commits, so a rolled-back change should not send a transition email.

Health check

When an action is missing, check these values in order:

1. quote store view and current status;
2. target status state and store scope;
3. allowed actor on the transition;
4. required note setting;

5. customer-group and storefront access settings;
6. administrator ACL and any status-disabled feature;
7. workflow rule conditions and notification configuration.

Do not edit the status column directly. Correct the transition or status configuration and test the same action as the affected actor.

Related pages

- Quote statuses
- Status transitions
- Admin permissions
- Quote lifecycle
- Quote workflow

Quote Tags

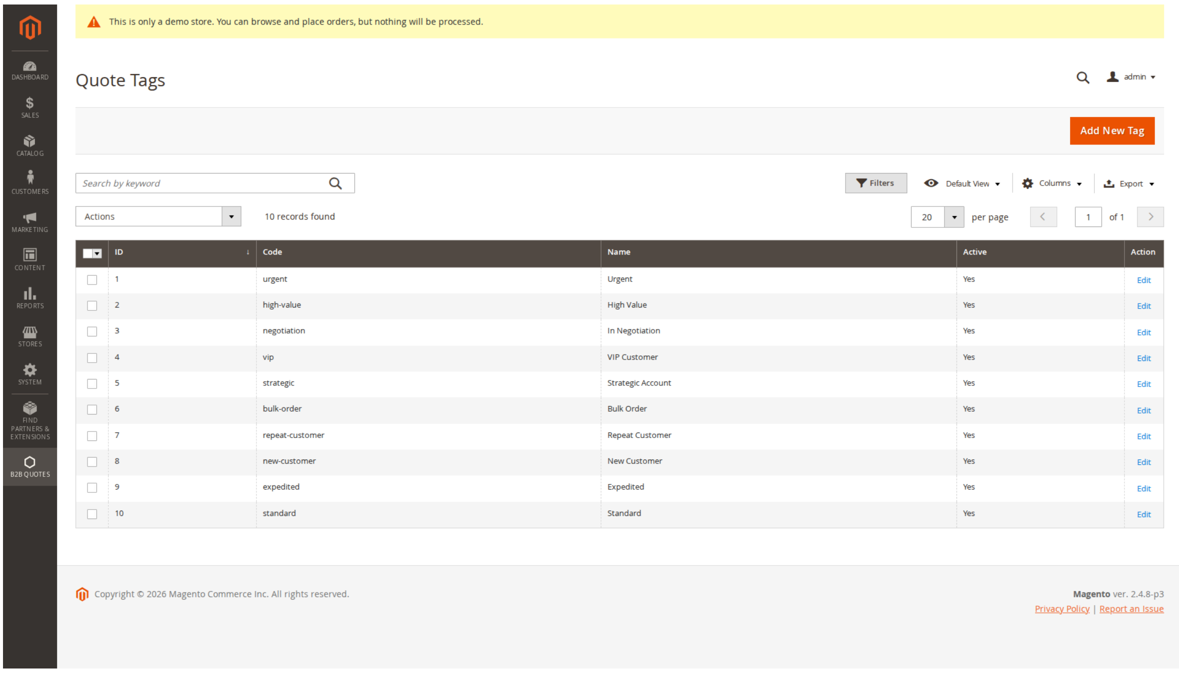
Tags mark quotes with reusable operational labels such as `Tender`, `Renewal`, or `Needs Technical Review`. A quote can carry several tags, and the REST add-on can return popular tags for selection interfaces.

Create a tag

Open **B2B Quotes > Quote Tags** and select **Add New Tag**.

Field	Meaning
Code	Unique API/import identifier
Name	Human-readable label
Active	Whether the tag remains selectable

Use a stable code such as `technical_review` and a natural name such as `Needs Technical Review`. There is no benefit in forcing the visible name to lowercase or replacing its spaces with hyphens.



Assign tags

Open a quote, select the required entries in **Tags**, and save. Tags are managed records; the quote form is not a free-form comma-separated tag field.

Use categories for a durable taxonomy and tags for flexible handling markers. Avoid encoding customer names, private notes, or values that belong in the quote message or admin note.

Retire a tag

The grid provides mass enable, disable, and delete actions. Deactivate a tag when it should stay attached to historical quotes but should no longer be selected. Delete only after checking relations and any API/import process that uses its code.

API and CSV access

The REST add-on includes tag, popular-tag, and quote-tag operations. The CSV add-on imports and exports tag records and relations. See REST API Add-On and CSV Import/Export Add-On.

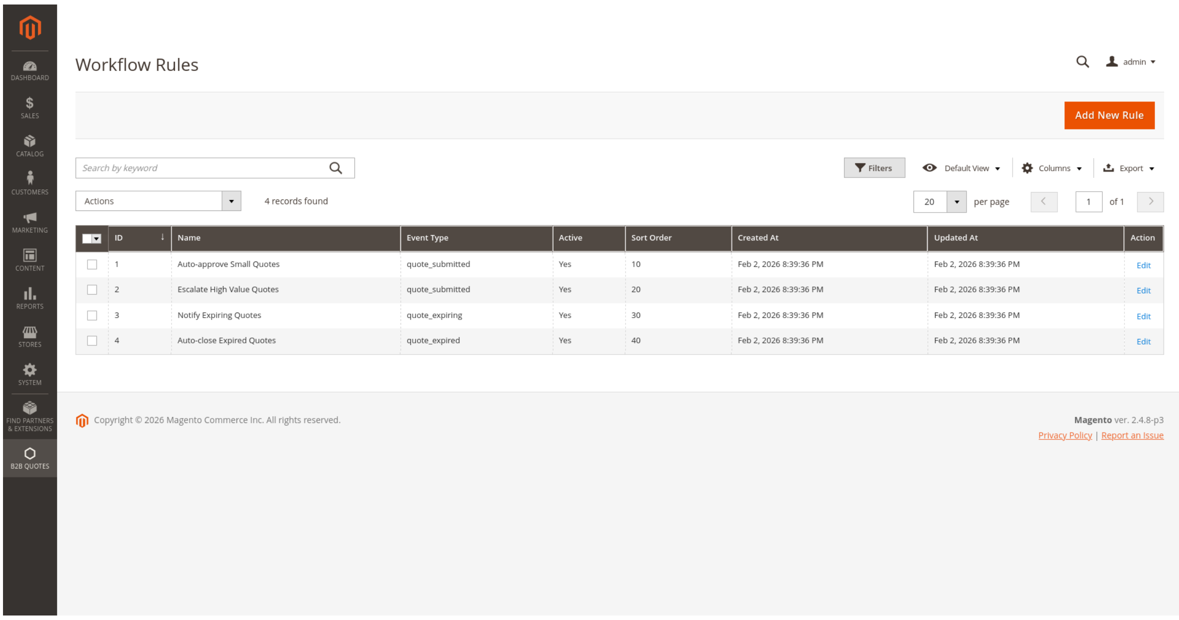
Related guides

- Projects, Categories, and Tags
- Quote Categories
- Quote Management

Workflow Rules

Workflow rules automate a response to a quote event. A rule can update the quote, notify people, add an internal record, or combine several actions when its conditions match.

Open **B2B Quotes > Workflow Rules**.



Events that can start a rule

Choose one event for each rule:

- Quote Created
- Quote Submitted
- Quote Approved
- Quote Rejected
- Quote Expiring Soon
- Quote Expired
- Quote Converted to Order
- Price Negotiated
- Counter Offer Received
- Status Changed
- Message Added

An event only starts evaluation. The rule's conditions still decide whether its actions run.

Conditions

Conditions can inspect:

- quote amounts, item count, quantity, dates, customer, and project;

- current status, underlying state, and status capabilities;
- days until expiry;
- billing and shipping country, region, city, postcode, and telephone;
- quoted item SKU, name, quantity, price, row total, and product ID.

Combine conditions with **all** or **any** logic. Keep the tree readable; several small rules are often easier to audit than one rule with many unrelated branches.

Actions

A matching rule can:

- change the quote status;
- send an email template;
- apply a discount amount;
- set or clear a configured quote fee;
- set, extend, or clear the expiration date;
- add or remove a tag;
- add an administrator or customer note.

Actions run in their configured order. If one action changes data used by another action, test the complete sequence rather than each action in isolation.

Create a rule

1. Select **Add New Workflow Rule**.
2. Enter a descriptive name.
3. Choose the event type.
4. Leave the rule inactive while configuring it.
5. Set its sort order; lower numbers have higher priority.
6. Add the conditions.
7. Add one or more actions.
8. Save and exercise the exact event with a realistic quote.
9. Verify the quote history, status, totals, notes, tags, and email delivery before activating the rule.

Example: route a large submitted quote

A rule named **Large quote requires commercial review** could use:

- event: **Quote Submitted**;
- condition: quote subtotal is at least 10,000;
- actions: change status to **Commercial Review**, add an administrator note, and send an internal notification template.

This keeps the status change, audit note, and notification together while leaving ordinary submissions untouched.

Status transition validation

Customer and administrator actions are checked against the configured Status Transitions. Workflow actions can also be required to follow that transition map through the **Transition Validation** setting.

Enable validation when automation must obey the same process as a person. If it is disabled, document any rule that intentionally moves a quote outside the normal path.

Avoid automation loops

A **Status Changed** rule that changes the status again can trigger more status-based processing. Likewise, a **Message Added** rule that adds a customer note can create an unexpected chain.

To keep rules predictable:

- add a condition for the exact source state or status;
- choose a target that cannot immediately satisfy the same rule again;
- do not duplicate the same side effect in several rules;
- test with logging and email capture enabled;
- review quote history after the test, not only the final status.

Troubleshooting

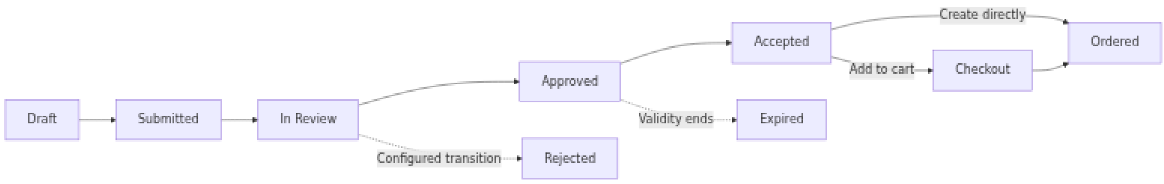
If a rule does not run, verify the selected event, active flag, condition values at the moment of the event, and sort order. If a status action fails, inspect transition validation and the matching actor transition. For email actions, verify that the selected Magento email template is valid and that email delivery works independently of the rule.

Related pages

- Workflow Rules Explained
- Status Transitions
- Quote Statuses
- Quote Lifecycle

Quote Lifecycle

A quote normally moves from a customer draft to a submitted request, a reviewed offer, customer acceptance, and finally an order. SoftwareSilo B2B Quote separates the fixed lifecycle **state** from the business-facing **status**, so teams can use helpful labels without changing how the extension behaves.



Fixed quote states

State	What happens here
Draft	The request is still being prepared. Items, quantities, notes, and addresses can be completed before submission.
Submitted	The customer has sent the request to the merchant.
In Review	The merchant and customer can work through product, pricing, delivery, and message details.
Approved	The merchant has released an offer for the customer.
Accepted	The customer has accepted the offer. Depending on configuration, this creates an order directly or puts the agreed items into the cart.
Ordered	The quote has been converted into a Magento order.
Rejected	The current offer was declined. A configured transition can still allow the workflow to continue.
Expired	The validity period ended.
Cancelled	The quote was cancelled.

`Ordered`, `Expired`, and `Cancelled` are final states.

States and statuses are different

States are fixed because application logic depends on them. Statuses are configurable, store-scoped labels assigned to a state.

For example, a merchant can create **Commercial Review** and **Technical Review** as two statuses under the fixed **In Review** state. People see the precise next step, while the extension still knows that both quotes are in review.

See Quote Statuses and Status Transitions.

A practical request-to-order flow

1. The customer creates a draft from product pages, the cart, an earlier order, or an agreement call-off.
2. The customer completes the request and submits it.
3. Sales reviews availability, requested quantities, addresses, shipping, messages, and attachments.
4. Sales sets offered prices, discounts, fees, and expiration, then approves the offer.
5. The customer accepts, sends a counter offer, or follows another configured transition.
6. Acceptance either creates an order directly or moves the agreed items into the cart for normal checkout.
7. The quote retains its messages, attachments, and revision history as the record of the negotiation.

Guest requests follow the same commercial idea but use a secure access token instead of a customer account. Agreements can turn an eligible customer quote into a reusable purchasing arrangement with later call-offs.

Designing your status map

Start with the shortest process that reflects how sales actually works. Add statuses only where they communicate a distinct responsibility or next action. For every status, decide:

- who may move into and out of it;
- whether a note is required;
- who receives a notification;
- what the next valid statuses are;
- whether automation should follow the same transitions as people.

Do not use a new status merely as a reporting tag. Categories and tags are better for classification that does not change workflow.

Related

- Quote workflow from draft to order
- Price Negotiation
- Cart and Quote-to-Order Conversion
- Guest Quotes
- Revision Tracking
- Agreements and Call-Offs
- Workflow Rules

Price Negotiation

Price negotiation keeps the requested catalogue price, the merchant's offered price, customer notes, messages, and counter offers together on one quote. Both sides can see what is being discussed without moving the commercial record into an email thread.

A typical negotiation

1. The customer adds products and requested quantities to a draft.
2. The customer explains delivery, specification, or pricing requirements and submits the quote.
3. Sales reviews each line and enters an offered price where the catalogue price should change.
4. Sales adds an explanation or supporting attachment and approves the offer.
5. The customer accepts the offer or sends a counter offer when that action is enabled for the current quote.
6. After agreement, acceptance creates an order directly or returns the agreed items to the cart, depending on configuration.

The offered unit price is the effective negotiated price. Quote totals and discounts are recalculated from it.

Merchant pricing options

An administrator can price individual quote items directly and can use discounts, quote fees, shipping amounts, or automated pricing rules where appropriate. Keep each adjustment understandable: the customer should be able to reconcile line prices and totals without knowing Magento's internal calculations.

Pricing Rules are useful for consistent policies. Direct item pricing is better for a one-off negotiation that depends on context a rule cannot express.

Customer counter offers

Counter offers depend on three things:

- negotiation is enabled under **Pricing Settings**;
- customer counter offers are enabled under **Frontend Settings**;
- the quote's current state and available action allow a counter offer.

When a customer sends one, the merchant can review the proposed item pricing, respond through the quote, and release a revised offer. Configure the counter-offer email template if both teams rely on email alerts.

Visibility and communication

The **Show Prices** setting controls whether prices appear in customer quote views and customer PDFs. Messages work well for commercial explanations; attachments are better for specifications, drawings, or terms that need to stay with the quote.

Revision tracking provides the audit trail for price and item changes. Check the history when two people remember an earlier offer differently.

Operating advice

- Use offered prices consistently instead of hiding concessions in free-text notes.
- Explain material changes in a message that the customer can see.
- Add an expiration date before releasing time-sensitive pricing.
- Review tax, shipping, fees, and the grand total, not only the unit price.
- Test the complete acceptance path after changing price, stock, shipping, or payment settings.

Related

- Quote Lifecycle
- Pricing Rules
- Messaging
- Attachments
- Revision Tracking
- Quote Management

Pricing Rules

Pricing rules turn a repeatable sales policy into automatic quote pricing. They work well for policies such as “give wholesale customers 8% off once the quote subtotal reaches 2,500.” They are less suitable for one-off commercial decisions, which an administrator can price directly on the quote.

What a rule can evaluate

The condition builder can use:

- quote totals, total quantity, and item count;
- customer and customer group;
- product attributes and product combinations.

Conditions can be grouped with **all** or **any** logic. Keep them narrow enough that a rule cannot accidentally affect every submitted quote.

Pricing actions

A matching rule can:

Action	Result
Percentage discount	Subtracts a percentage from the original item price.
Fixed discount	Subtracts a fixed amount.
Adjust to percentage	Sets the result to a percentage of the original price.
Adjust to fixed price	Sets the resulting item price to a fixed value.
Free shipping	Removes the quote shipping charge.

“Fixed discount” and “fixed price” are not the same. For a product priced at 100, a fixed discount of 10 results in 90; a fixed price of 10 results in 10.

Rule order and stacking

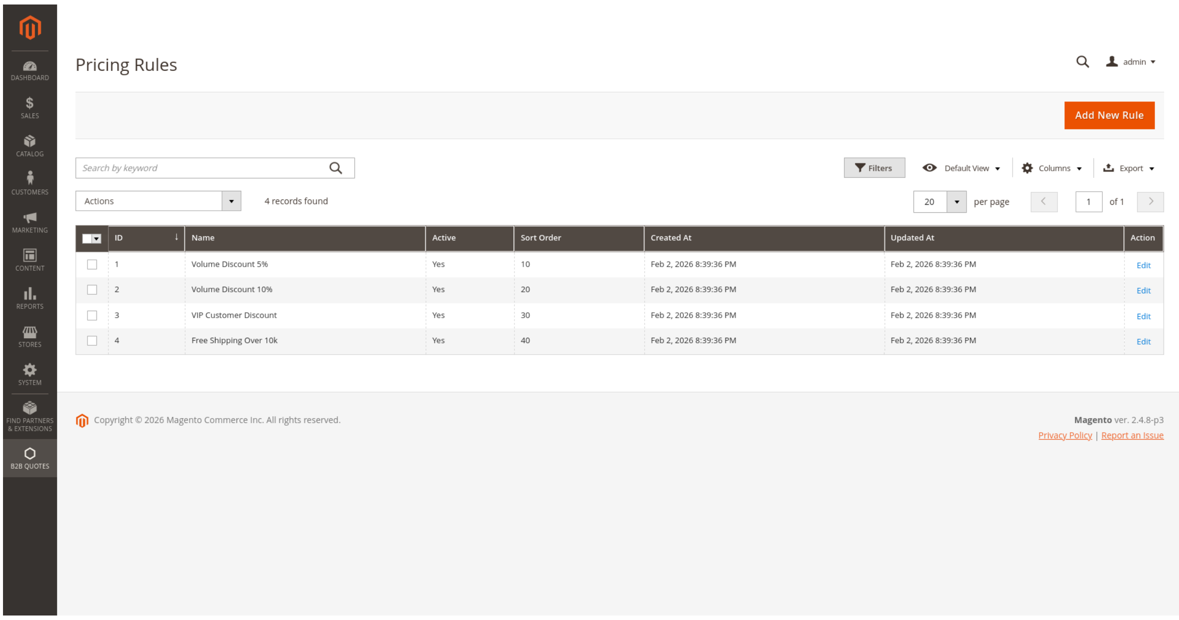
Lower sort-order values are evaluated first. The **Can Stack Rules** configuration decides whether several matching rules can contribute to the same quote.

- With stacking disabled, the first applicable rule wins.
- With stacking enabled, every intended combination needs testing; two sensible discounts can produce an unintended result when combined.

Set up a rule safely

1. Open **B2B Quotes > Pricing Rules**.
2. Create the rule but leave it inactive.
3. Give it a name that describes both the audience and the outcome.
4. Build the condition tree and select one pricing action.
5. Set the sort order with existing rules in mind.
6. Test a quote just below, exactly at, and just above each threshold.
7. Check item prices, discount, tax, shipping, and grand total.
8. Activate the rule only after the complete result is correct.

For field-by-field administration instructions, see Manage Pricing Rules.



If a rule does not apply

Check that the rule is active, every required condition matches the quote, the customer is in the expected group, and the targeted product attributes have values. When stacking is disabled, also check whether a lower sort-order rule matched first. Recalculate the quote after changing relevant data.

Related

- Quote totals and calculation
- Manage Pricing Rules
- Price Negotiation
- Workflow Rules
- Quote Management

Quote totals and calculation order

Quote totals are recalculated whenever an item, price, address, shipping method, payment method, rule, or fee changes. The total shown to the customer is the result of the quote data saved for that store view, not a value copied from an earlier message.

What contributes to the total

The calculation uses the following commercial inputs:

1. quantity multiplied by the effective unit price for each item;
2. item discounts and pricing-rule adjustments;
3. tax calculated from the quote address and item/shipping tax settings;
4. the selected shipping amount and any shipping adjustment;
5. quote fees and their tax setting;
6. the resulting subtotal, discount, tax, shipping, and grand total.

The exact tax result still comes from Magento tax configuration, product tax classes, destination, and store currency. B2B Quote stores the quote snapshot so that the offer can be reviewed before conversion.

Catalogue price and offered price

An item keeps the price captured when it was added. An administrator's **Offered Price** replaces that unit price for the negotiated line. A customer **Counter Price** is a proposal until the workflow accepts it as the next commercial offer. Updating a quantity multiplies the effective unit price by the new quantity and then recalculates the quote.

Do not hide a concession in a note. Use the offered-price field so the quote, PDF, order, and revision history can show the commercial value consistently.

Discounts and rules

Pricing rules can set a percentage discount, fixed discount, percentage-based price, fixed price, or free shipping. The sort order decides which matching rule runs first. When stacking is disabled, the first applicable rule wins; when stacking is enabled, every matching rule contributes according to its action. Recalculate after a rule or its conditions change.

Manual negotiation and automatic rules should have an explicit business order. Test a quote below, at, and above each threshold, then check the line prices, discount, tax, shipping, fee, and grand total. See Pricing rules.

Fees and shipping adjustments

A quote fee is a quote-level commercial amount. The fee may be taxable depending on its configuration. A shipping adjustment changes the stored shipping amount without pretending that the carrier rate itself changed. The admin editor should show both the selected method and any adjustment so the customer can reconcile the offer.

When a shipping address or product changes, refresh the rate before applying a manual adjustment. A stale method can be rejected during direct order creation.

Rounding and currencies

Magento's currency precision and tax configuration govern rounding. Do not recalculate totals in an external spreadsheet and write them back as a replacement for quote calculation. For dashboard reports, keep store views and base currencies separate. A dashboard export must not add amounts from different base currencies as though they were one currency.

Diagnose a wrong total

Check the quote in this order:

- item quantity, catalogue price, offered price, and row total;
- applied pricing rules and their sort order;
- quote address and product tax configuration;
- shipping method, shipping amount, and shipping adjustment;
- fee amount and fee tax setting;
- store currency and the most recent recalculation.

Then compare the quote PDF and, after conversion, the cart or order. If only the order differs, check the configured price-change and stock policies. If the quote itself differs, save the relevant editor change and recalculate before comparing again.

Related pages

- Price negotiation
- Quote fees
- Address, shipping and payment
- Cart and quote-to-order conversion
- Revision tracking

Address, Shipping and Payment

A negotiated quote needs enough fulfilment data to calculate a credible offer and, later, create a valid Magento cart or order. B2B Quote therefore keeps quote-specific billing and shipping addresses, the selected shipping method, and the selected payment method with the commercial record.

Quote addresses

Quote addresses are stored separately from Magento checkout addresses in `b2b_quote_address`. This allows a negotiation to use an address snapshot without changing a customer's normal checkout data.

For logged-in customers, **Use Customer Address Book** controls whether account addresses are available in the quote flow. Customers can also create or copy an address for the quote, depending on the active interface.

Guests enter quote-specific addresses. Once saved, those addresses can be selected again inside the same token-protected quote, but they do not become a customer address book.

The base address fields are first name, last name, street, city, country, and postcode. Store configuration can additionally require company, telephone, fax, prefix, or suffix. Save billing and shipping independently when the business needs different destinations.

Shipping

When shipping information is required, a customer chooses an address and one of the Magento rates available for the quoted products and destination. The extension stores the method, description, and amount and includes shipping in quote totals.

The shipping configuration can require shipping data, apply a free-shipping threshold, and disallow selected Magento methods for B2B quotes and converted carts.

See Shipping in Quotes for the complete flow.

Rate estimation uses the quote items, subtotal, store, and destination. An empty quote has no rate result. The stored method uses Magento's `carrier_method` code and is accepted only while that method remains available. A method in the disallowed list is filtered from both the quote selection and the later checkout. A configured free-shipping threshold can also change the available amount.

Payment

Under **Payment Settings**:

- **Payment Required** makes payment selection part of the quote workflow;
- **Disallowed Payment Methods** removes selected methods from B2B quotes and from checkout after quote-to-cart conversion.

Payment availability still depends on Magento's normal method configuration, store scope, currency, country, order total, and other method rules.

If payment is required, do not submit an incomplete quote as a final offer. When a method is selected, B2B Quote validates it against the current quote totals and store restrictions. A purchase-order method also requires its PO number when Magento's payment adapter requires one. A method that becomes unavailable after approval is rejected during direct order creation rather than silently replaced.

Acceptance mode changes what is required

Acceptance mode	What happens
Create Order Directly	The extension creates the Magento order immediately. Complete addresses, valid shipping for shippable products, and a selected payment method are required.
Add to Cart	The agreed items and prices move to the cart. Checkout can collect or confirm fulfilment and payment details, subject to B2B Quote restrictions.

For direct order creation, the extension also checks quote expiration, product availability, stock, price-change policy, and the permitted status transition. A guest direct order requires a complete guest shipping address.

Launch checklist

- Test a registered customer using an existing address and a quote-specific address.
- Test a guest from a fresh browser session.
- Test “same as billing” and separate shipping addresses.
- Verify live shipping rates and the free-shipping threshold.
- Disallow one shipping and one payment method and confirm both quote and checkout behaviour.
- Accept a quote through direct order creation and add-to-cart mode.
- Compare quote, cart, order, invoice, and PDF totals, including tax, shipping, discount, and quote fee.
- Change an address after rate selection and confirm stale shipping is not silently retained.

Related pages

- Shipping in Quotes
- Cart and Quote-to-Order Conversion
- Guest Quotes
- Settings Reference

Agreements & Call-Offs

Agreements turn approved quote conditions into reusable purchasing arrangements. Customers can start later quote drafts with the agreed products and prices instead of rebuilding the request from scratch.

When To Use Agreements

Use agreements when a quote represents a negotiated framework instead of a one-time purchase.

Typical examples:

- annual purchasing agreements
- blanket orders with fixed item prices
- project-specific quantity commitments
- staged deliveries from one negotiated offer

Agreement Lifecycle

```
Approved Quote → Agreement → Call-Off Quote → Order
```

An agreement can be created from a customer quote when the quote has a workflow state that is eligible for conversion:

Quote State	Agreement Creation
Approved	Allowed
Accepted	Allowed
Ordered	Allowed
Draft / Submitted / Review	Not allowed
Rejected / Cancelled / Expired	Not allowed

The quote must belong to a customer and contain items. Guest quotes and empty quotes cannot be converted into agreements.

Agreement Statuses

Status	Meaning
`active`	Available for call-off ordering

Status	Meaning
`inactive`	Kept for reference, but not available for call-offs
`exhausted`	Quantities are fully consumed
`expired`	Validity date has passed or the agreement was closed by date

Only active agreements can start a call-off quote.

Agreement Data

Each agreement stores:

- agreement number
- name
- customer
- optional project
- source quote
- store scope
- validity dates
- notes

Each agreement item stores:

- product, SKU, and name
- agreed quantity
- consumed quantity
- agreed price
- optional item validity dates
- notes

Customer Workflow

Customers can open **My Agreements** in their account area.

Customers can also create an agreement themselves from one of their own quotes once that quote has reached an eligible state (approved, accepted or ordered — see the lifecycle table above). The action is offered on the customer's quote view; the extension checks that the quote belongs to the signed-in customer before converting it.

From the agreement detail page they can:

1. review agreement metadata
2. see agreed, consumed, and available quantities
3. enter call-off quantities
4. start a new draft quote from the selected quantities

The new quote is saved as a draft so the customer can review it before submission. It stores the agreement ID on the quote, the agreement item ID on each selected line, and the agreed item price as the offered price. If the agreement belongs to a project, the draft keeps that project relation.

Quantity Rules

Call-off quantities are validated before a draft quote is created.

Rule	Behavior
no quantity entered	request is rejected
quantity above available amount	request is rejected
inactive agreement	request is rejected
valid quantity	draft quote is created

Available quantity is calculated as agreed quantity minus consumed quantity. Creating a call-off draft does not increase the consumed quantity in the base package, so the draft does not reserve any part of the agreement. If later call-offs must use a binding remaining balance, the process that confirms fulfilment must also update the consumed quantity.

Admin Workflow

Admins can manage agreements in the Magento admin under **B2B Quotes > Agreements**.

Admins can:

- create agreements manually
- convert eligible quotes into agreements
- edit agreement metadata
- add or update agreement items
- set status and validity dates
- delete agreements when no longer needed

See Agreement Management for the admin UI details.

Database Tables

Agreements use these tables:

Table	Purpose
`b2b_quote_agreement`	Agreement header records

Table	Purpose
`b2b_quote_agreement_item`	Agreement item quantities and prices

The base quote tables also contain agreement references:

Table	Column	Purpose
`b2b_quote`	`agreement_id`	Links a quote to the source agreement
`b2b_quote_item`	`agreement_item_id`	Links quote lines to agreement items

Related

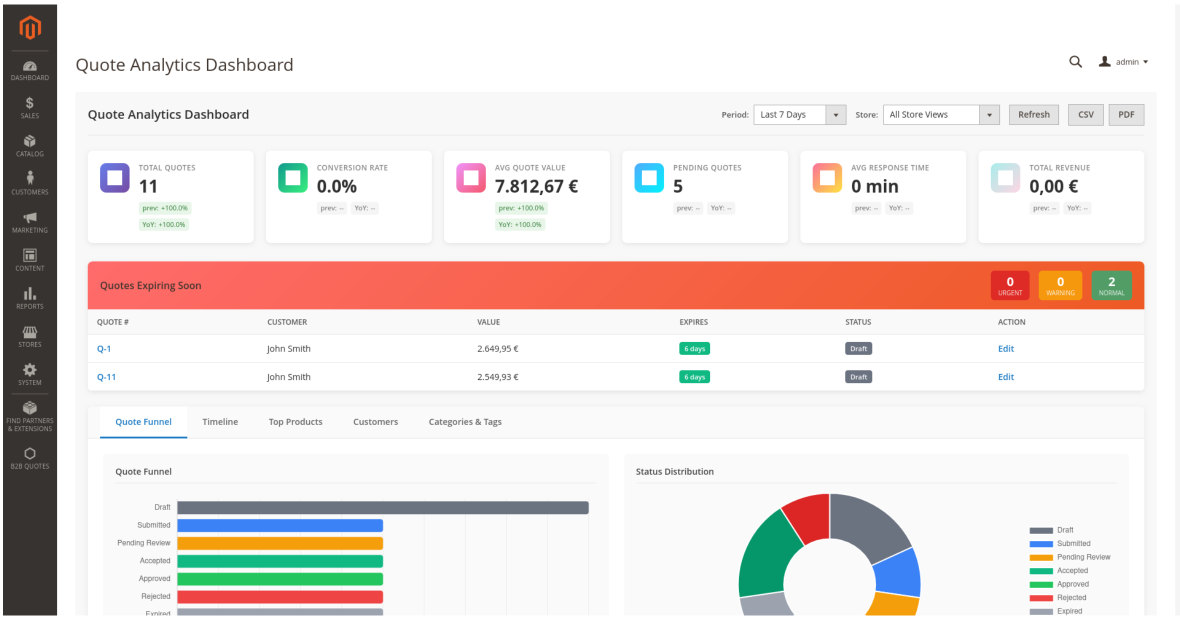
- Quote Lifecycle
- Cart & Order Conversion
- Projects
- Agreement Management
- Database Reference

Quote Analytics

The quote dashboard helps sales teams move from a list of requests to practical questions: Which offers need attention? Where do quotes stall? Which customers and products generate interest but few orders?

It brings together:

- quote KPIs for a selected period and store view;
- a funnel and status distribution with quote-level drill-down;
- created-versus-converted and revenue timelines;
- quotes expiring in the next seven days;
- most-quoted products and product conversion rates;
- top customers and customer-group activity;
- category, tag, and category-value reporting;
- CSV and PDF exports for authorised administrators.

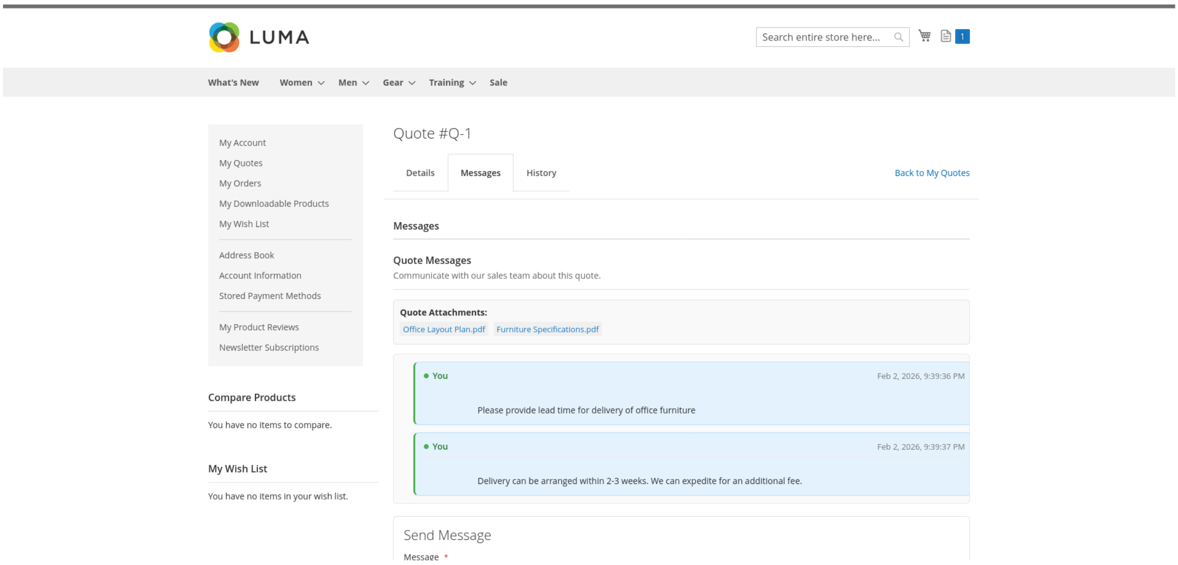


The dashboard is most useful when statuses, expiration dates, categories, and tags are maintained consistently. It reports the data recorded in the quote workflow; it cannot infer missing classifications or explain a conversion change on its own.

For filters, exports, permissions, drill-downs, and troubleshooting, see Quote Analytics Dashboard.

Attachments

Attachments keep the documents needed for an offer with the quote itself. Customers and administrators can exchange specifications, drawings, bills of materials, reference images, and other supporting files without separating them from the negotiation record.



Storefront limits

Under **Stores → Configuration → MageB2B → B2B Quote → Attachments**, configure:

Setting	Purpose
Allowed File Extensions	Comma-separated allowlist such as `pdf,xlsx,jpg,png,zip`.
Max File Size (MB)	Per-file application limit. The configuration screen also reports relevant server limits.
Max Attachments (Frontend)	Maximum files allowed on a storefront quote; `0` means unlimited.
Disable Attachments for Statuses	Hides existing attachments and disables upload for the selected quote statuses.

The effective upload size cannot exceed PHP and web-server limits even if the extension allows a larger value.

Upload and message association

The storefront can upload a file directly to a quote or stage it while a message is being composed. A staged file is linked to the quote and message only when the message save completes. If the message is cancelled, clear the staged upload so an unreferenced file is not left in the quote media area.

Administrators can attach a file to the quote or to a message from the admin editor. The uploader type and quote ID are stored with the attachment. A file does not become visible to the customer merely because it exists in storage: the message visibility and the current quote status still apply.

The upload validates the configured extension, the detected file type (MIME type), file size, and quote status. A browser filename alone is not sufficient to pass the file-type check. Download and delete actions also require access to the quote and are disabled for statuses listed in **Disable Attachments for Statuses**.

Sensible policy

- Allow only formats your sales team genuinely needs.
- Prefer PDF for documents that should not be edited.
- Use a practical attachment count instead of unlimited uploads on a public storefront.
- Disable attachments after the workflow reaches a locked or final status when further document exchange is not appropriate.
- Treat attachments as customer-provided files: scan and review them according to your organisation's security policy.

When an upload fails

Check the extension allowlist, configured file-size limit, PHP upload limits, web-server request limits, storefront attachment count, and the quote's current status. A filename extension being allowed does not override a server limit or a disabled workflow status.

For signed quote documents, see the OpenSign Add-On.

Bulk Import & Export

B2B Quote includes bulk item handling for faster quote entry. Customers can paste item rows or upload a file instead of adding every product manually.

Supported Import Data

The bulk import parser supports these columns:

Column	Required	Notes
`sku`	yes	Product SKU
`qty`	yes	Requested quantity
`price`	no	Optional customer target price
`notes`	no	Optional line note

If no header row is present, the default column order is:

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

Supported Formats

Bulk import accepts pasted text and uploaded `.csv` or `.txt` files.

Supported delimiters:

- comma
- semicolon
- tab
- space

The parser can detect headers when the first row contains `sku` or `qty`.

Validation

The import validates:

- SKU exists in the Magento catalog
- quantity is valid
- duplicate SKUs are handled before item creation
- optional price values are numeric when present

Invalid rows are rejected with row-level feedback so customers can correct the import data.

Export

Bulk export writes quote items into a CSV structure compatible with import:

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

This is useful for customers who maintain requested items in spreadsheets and want to revise the quote externally.

Add-On Import & Export

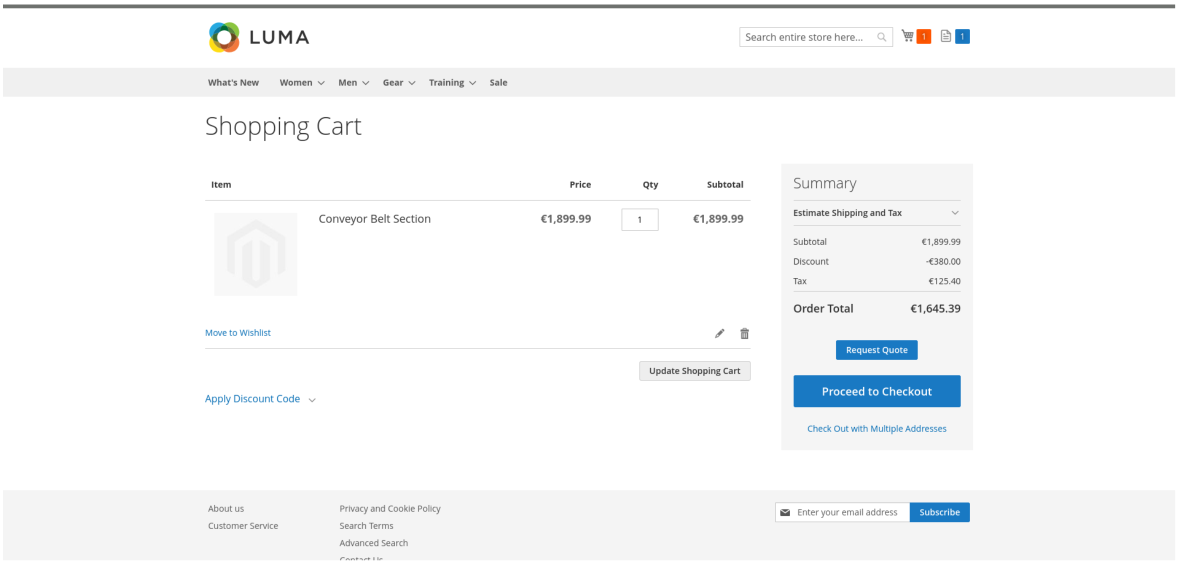
The optional CSV Quote Import/Export add-on handles complete quote-domain records through Magento's Data Transfer screens and dedicated CLI commands. It covers quotes, items, addresses, messages, projects, categories, tags, statuses, transitions, and fees. This is separate from the customer-facing item CSV described on this page.

Related

- Frontend Experience
- Cart & Order Conversion
- CSV Quote Import/Export Add-On

Cart and Quote-to-Order Conversion

B2B Quote connects ordinary Magento shopping with negotiated sales in both directions: a shopper can turn the cart into a quote request, and an accepted offer can either create an order directly or return its agreed items to the cart for checkout.



Cart to quote

When cart conversion is enabled, the storefront shows a configurable request-a-quote action. The extension copies eligible cart items into a B2B quote and redirects the shopper to continue the request.

Relevant settings under **Frontend Settings** are:

- **Enable Cart to Quote Conversion**;
- **Minimum Cart Amount**;
- **Cart Conversion Button Text**.

The flow supports logged-in customers and, when enabled, guests. A guest flow creates or reuses a token-scoped draft quote.

Accepting an offer

The **Accept Mode** setting provides two outcomes:

Mode	Result
Create Order Directly	Validates the quote and creates a Magento order immediately.

Mode	Result
Add to Cart	Places the accepted quote items into the customer's cart so normal checkout completes payment and ordering.

You can optionally let the customer choose between the configured modes. For add-to-cart acceptance, decide whether the existing cart should be cleared first; otherwise unrelated cart items can become part of the checkout.

Acceptance is a workflow action, not a shortcut around the quote state. The customer needs a valid transition from the current status to an accepted status. The quote must not be past its expiration date. If the administrator has already moved the quote to an accepted status, order creation can continue without applying the customer transition a second time.

Direct order validation

Before direct order creation, the extension can check:

- whether quoted products still exist and are enabled;
- stock availability and the configured out-of-stock behaviour;
- product price changes and the configured price-change behaviour;
- addresses, shipping method, and payment method;
- quote expiration and the permitted transition into the accepted state.

If direct creation fails, the acceptance transaction restores the previous quote status rather than leaving a partially accepted record.

Price policy

The order-creation settings define what happens when the catalogue price has changed since the quote was prepared:

Policy	Behaviour
Use quoted price	Keeps the negotiated item price after the configured checks pass.
Use current price	Rebuilds the Magento cart line with the current product price.
Block on change	Stops conversion and reports the changed product.

The exact labels can vary with the admin translation, but the decision is made for each product before Magento creates the order. A negotiated offered price is not the same as a free-text note. If the quote contains an offered price, review the selected policy before accepting it.

Stock and product policy

The conversion checks the configured stock behaviour and can block a missing or unavailable product. It also verifies that every quoted product still exists and is enabled. Backorders, multi-source inventory (MSI) reservations, and stock validation are Magento store rules plus the B2B Quote order-creation policy. Test the actual product types used by the store rather than assuming that a successful draft can always become an order.

Transaction boundary

The quote row is locked while acceptance is processed. Direct order creation and add-to-cart conversion run inside a transaction. A failed product, shipping, payment, price, stock, or transition validation rolls back the conversion. If acceptance had changed the status first, the previous status is restored. Check for an existing order or cart change before retrying a request.

Add-to-cart mode returns the affected cart items, not an order number. The quote remains the source commercial record, while Magento checkout performs the final payment and order steps.

Configuration checklist

Under **General Settings**:

- Accept Mode
- Allow Customer to Choose Accept Mode
- Clear Cart After Conversion
- Clear Cart Before Accepting into Cart

Under **Order Creation Settings**:

- Price Change Behaviour
- Stock Validation Behaviour
- Check Product Availability

Shipping and payment restrictions are configured in their own B2B Quote sections.

Test before launch

1. Convert an ordinary customer cart containing several product types.
2. Repeat as a guest if guest quotes are enabled.
3. Accept an approved offer in both supported modes.
4. Test with an existing non-empty cart.
5. Change a product price after quote approval and verify the selected policy.
6. Make an item unavailable and verify stock and availability behaviour.
7. Test a shipping method that later becomes disallowed.
8. Test an expired quote and a quote without a valid acceptance transition.

9. Verify order items, negotiated prices, tax, shipping, quote fee, customer/guest data, and the final quote state.

Record the expected quote state and cart contents before each acceptance test. For the failure cases, also verify that no duplicate order, partial cart, or incorrect accepted status remains after the error.

Troubleshooting

If cart conversion is missing, check the feature switch, minimum amount, customer/guest eligibility, and theme block placement. If acceptance reports **Transition not allowed**, add the appropriate customer transition from the current status to an accepted-state status. For direct-order failures, resolve the specific product, price, stock, address, shipping, or payment validation instead of bypassing it.

Related pages

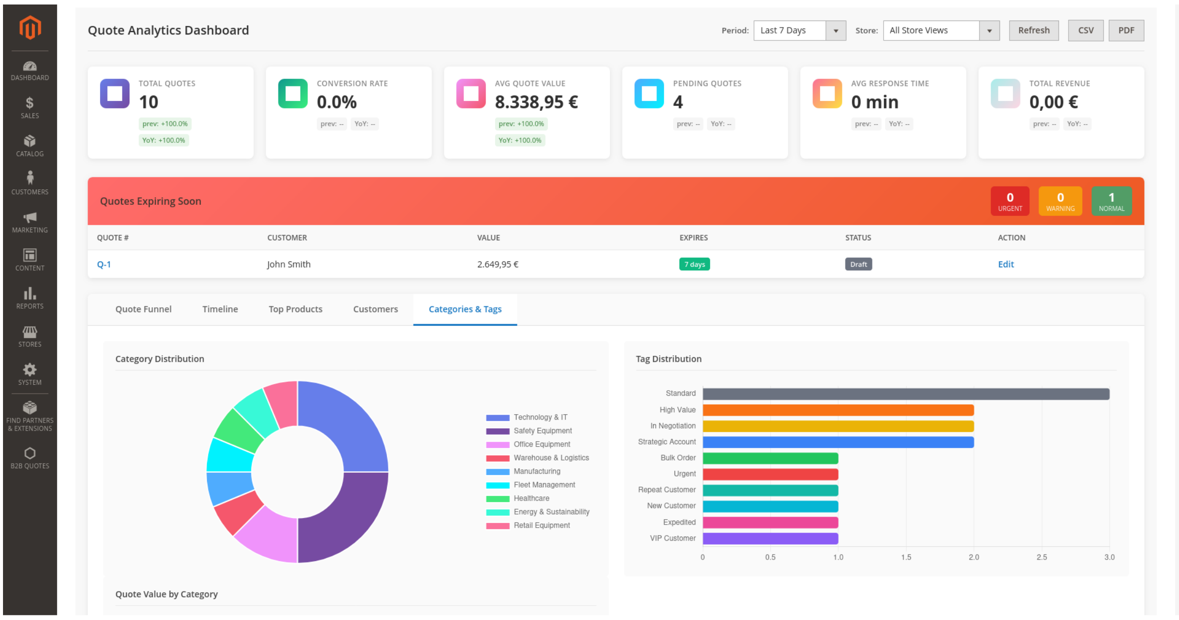
- Order to Quote
- Address, Shipping and Payment
- Shipping in Quotes
- Quote Lifecycle

Categories and Tags

Categories and tags add business context to a quote without changing its status.

- A **category** is a broad, ordered classification such as **Equipment**, **Spare Parts**, or **Services**.
- A **tag** is a reusable marker such as **Priority Account**, **Renewal**, or **Export Review**.

They help administrators filter the quote grid and make the category and tag sections of the analytics dashboard meaningful.



Use categories for a small, stable reporting structure. Use tags for cross-cutting details that can apply to many categories. Avoid creating a new tag for every free-form note; that quickly produces inconsistent reports.

Management details:

- Quote Categories
- Quote Tags
- Quote Analytics Dashboard

Duplicate & Compare Quotes

B2B Quote includes customer-facing quote duplication and comparison features for repeat purchasing and negotiation workflows.

Duplicate Quotes

Customers can duplicate one of their own quotes from the quote list or the quote view when duplication is enabled (`b2bquote/frontend_settings/allow_duplicate_quote`). Only signed-in customers can duplicate, and only for quotes that belong to their own account.

The duplicated quote is created as a draft and redirects the customer to the quote edit page.

Copied Data

Duplicating a quote keeps the useful quote structure while starting a new negotiation.

The new draft always keeps the customer, store, project, quote addresses, products, requested quantities, catalogue prices, and product options. It does not copy the old lifecycle or order relation.

Under **Frontend Settings > Duplicate Quote: Copy Fields**, choose which additional business fields should carry over:

- purchase order number and customer note;
- expiration date;
- shipping method and shipping amount;
- payment method;
- quote fee;
- discount adjustment.

Messages, attachments, approvals, revisions, counter prices, and the old offered prices are not treated as a new negotiation. Review the draft before submitting it.

Compare Quotes

The compare view lets signed-in customers review several of their own quotes side by side. It is available from the customer quote list; quotes that do not belong to the customer are rejected.

Typical Use Cases

- compare old and new quotes before accepting
- duplicate a recurring quote and adjust quantities
- keep a previous quote as reference while negotiating a new one

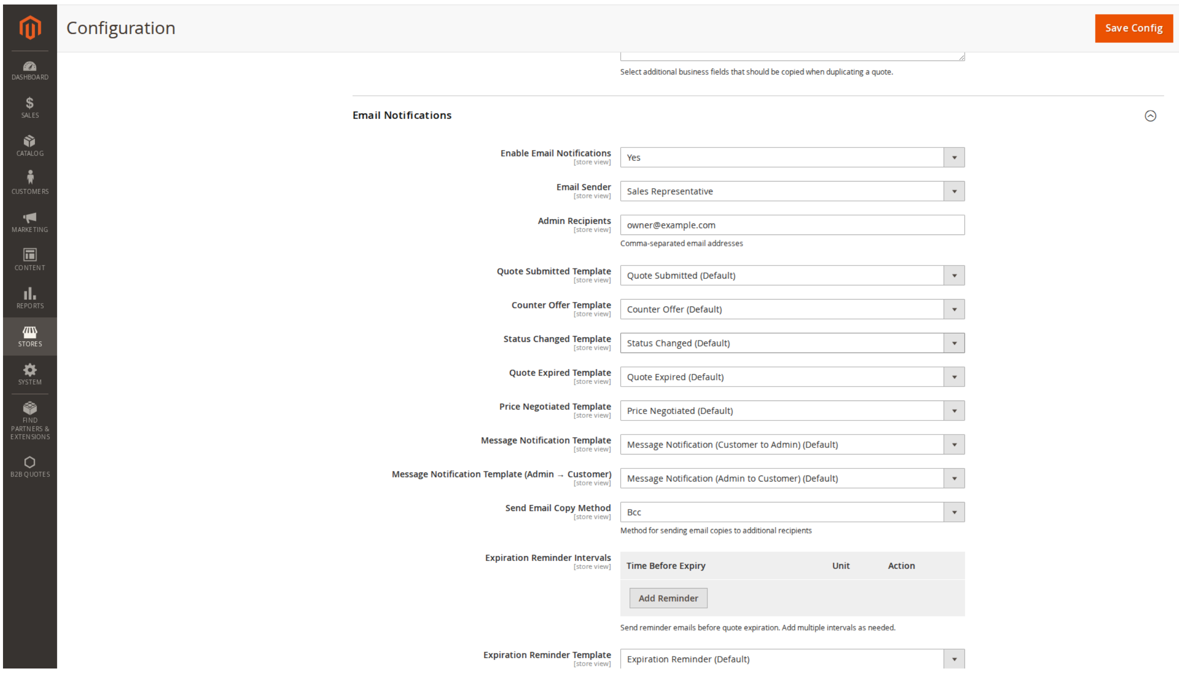
- compare project quotes across different status stages

Related

- Quote Lifecycle
- Frontend Experience
- Projects

Email Notifications

B2B Quote emails keep customers and the sales team informed without moving the negotiation out of Magento. Templates can cover submission, counter-offers, negotiated prices, status changes, expiration, reminders, and new messages.



Configure delivery

Open **Stores → Configuration → MageB2B → B2B Quote → Email Notifications**.

Setting	Purpose
Enable Email Notifications	Master switch for extension emails.
Email Sender	Magento sender identity used for messages.
Admin Recipients	Comma-separated internal addresses.
Quote Submitted Template	Notification when a request is submitted.
Counter Offer Template	Notification for a counter-offer.
Status Changed Template	Notification for status transitions.
Quote Expired Template	Notification after expiration.
Price Negotiated Template	Notification when negotiated pricing changes.
Customer Message Template	Message notification sent to the customer or guest.
Admin Message Template	Message notification sent to administrators.

Setting	Purpose
Email Copy Method	Controls how additional recipients receive copies.
Attach Quote PDF	Adds the current quote PDF where supported.
Attach Customer Files	Adds quote attachments where supported.

Select templates created for the correct Magento area and review their store-view content. A template being selectable does not guarantee that every variable or link is suitable for the event.

Guest quote links

For guest quotes, event data includes the guest access URL and token information used by the standard templates. Treat that URL as sensitive: it grants access to the associated quote. Test guest emails in a fresh browser session and never use a real customer's token in screenshots or support notes.

Expiration reminders

Enable expiration reminders and configure one or more reminder intervals. The hourly `b2bquote_send_expiration_reminders` cron job finds eligible quotes and sends the configured reminder template.

Intervals should match how the sales team follows up. Too many reminders can train recipients to ignore them, while a single reminder close to expiry may leave no time to respond.

See Cron Jobs.

Attachments and message size

Attaching a PDF or customer files can make the email considerably larger. Confirm transport limits, file sensitivity, and whether the recipient should receive attachments rather than access them through the authenticated or tokenised quote page.

Test matrix

Before launch, test at least:

- a logged-in customer submission;
- a guest submission and its token link;
- a customer and administrator message in each direction;
- an approved offer and status change;
- a counter-offer or pricing update;
- an expiration reminder and final expiration;

- PDF and customer-file attachments when enabled;
- multiple administrator recipients and the chosen copy method.

Use Magento's configured mail transport or a development mail catcher. Verify subject, sender, recipient, store language, links, totals, and attached files—not only that a message exists.

Troubleshooting

If no message arrives, check the master switch, event-specific template, recipients, Magento mail transport, cron for reminders, and application logs. If only guest links fail, confirm guest quotes remain enabled in the quote's store scope and that the template uses the generated guest URL rather than constructing one manually.

Related pages

- Guest Quotes
- Messaging
- Quote PDFs and Layouts
- Cron Jobs

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 `b2bquote` as the URL prefix:

- Quote list: `b2bquote/quote/index`
- Quote view: `b2bquote/quote/view?id={quoteId}`
- Quote edit: `b2bquote/quote/edit?id={quoteId}`
- Quote messages overview: `b2bquote/quote/messages` — a customer-facing page listing the message threads of the customer's quotes

Logged-in customers also find **My Quotes** and **My Agreements** links in their account navigation.

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

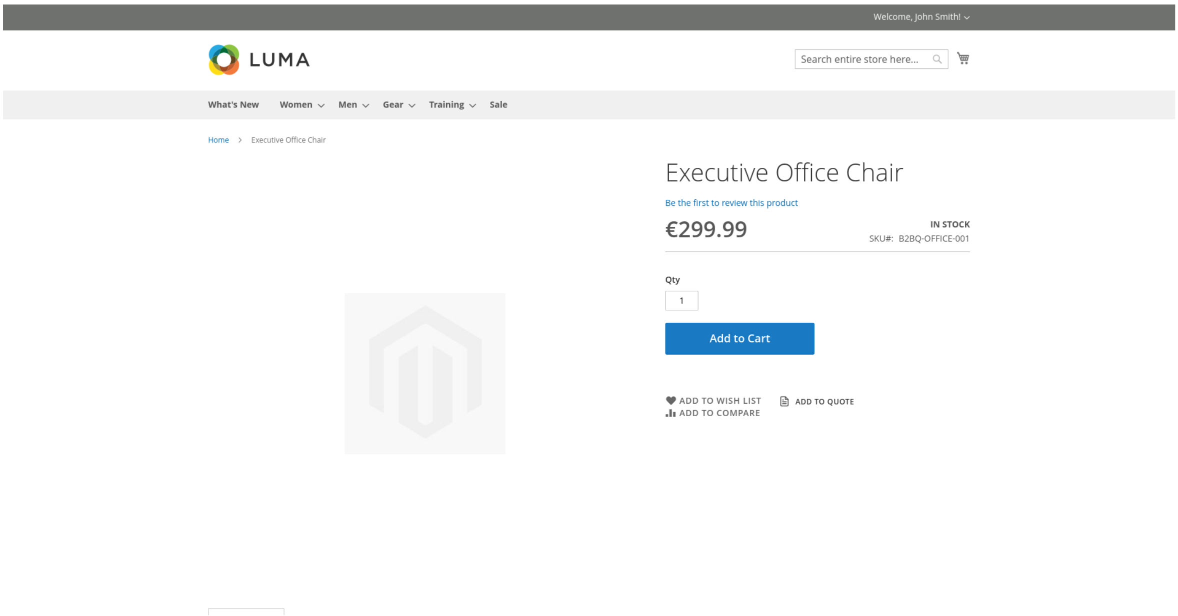
Quote list actions

On the quote list, customers can select several quotes and download a combined PDF, export them as a ZIP archive, or delete them. Individual quotes can also be cancelled from the list when their status permits it. The mini quote dropdown offers a delete action for removing drafts directly.

“Add to Quote” Button

Controlled by:

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



Mini Quote (Header Dropdown)

The mini quote is a Magento customer-data component that gives logged-in customers, and a guest with a valid quote token, a quick view of relevant quotes. Its display mode can show all quotes, exclude drafts, show active quotes, or show only quotes that require customer action.

See Mini Quote for the customer-visible fields, configuration, screenshot, and cache troubleshooting.

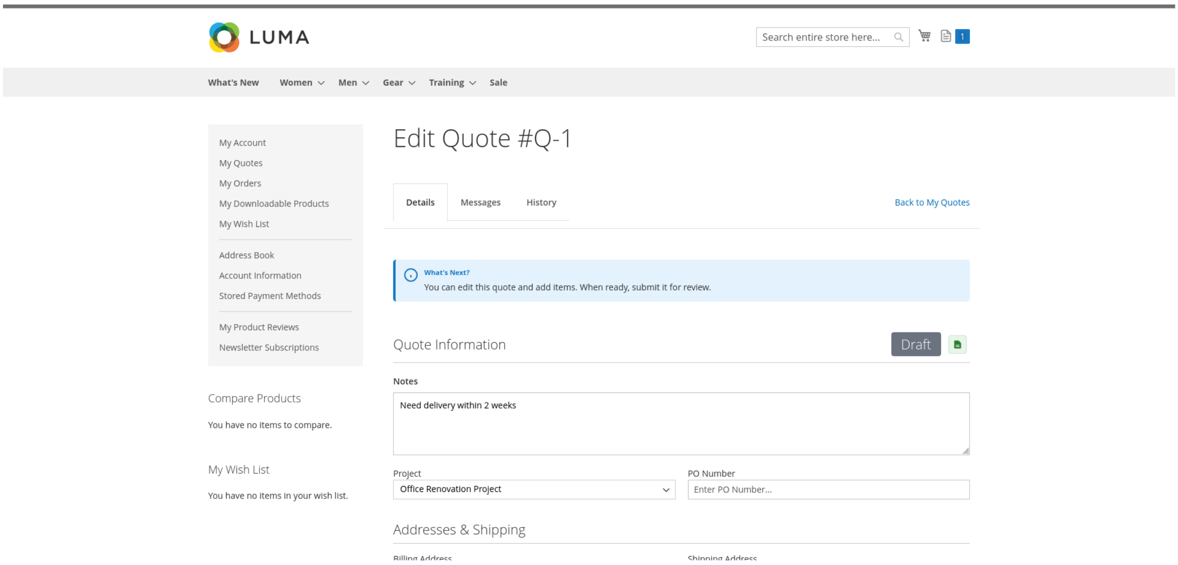
Quote Editing

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
```



Cart to quote conversion

The cart can show a quote action for eligible customers and guests. Cart and Quote-to-Order Conversion is the canonical reference for its settings, validation, and acceptance behavior.

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`

Related

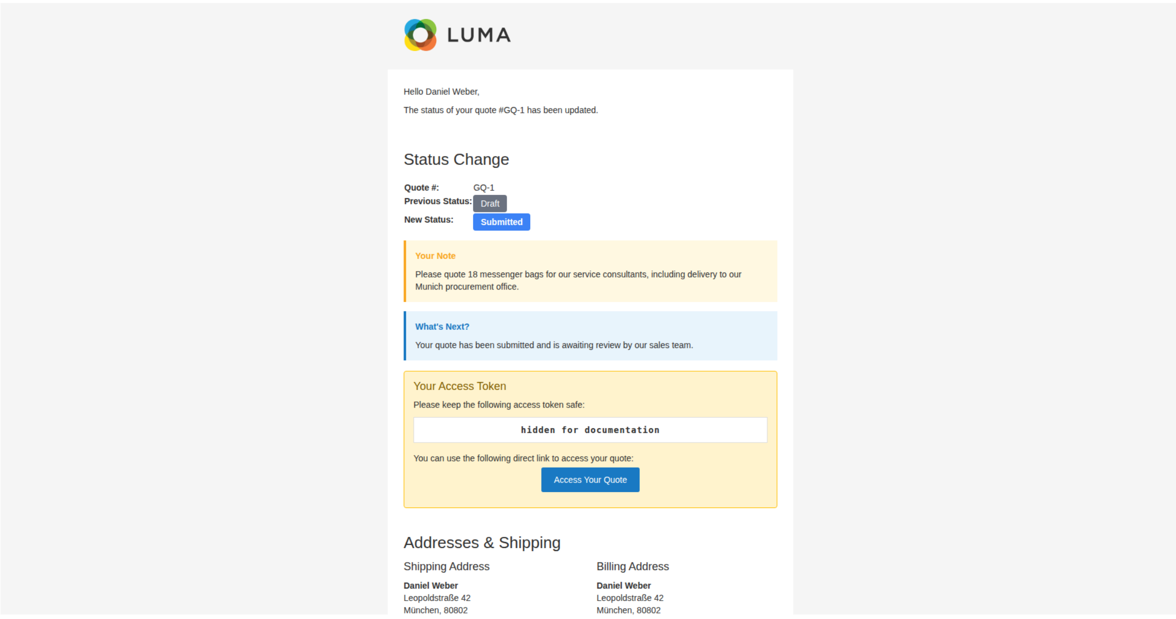
- Mini Quote
- Bulk Import & Export
- Duplicate & Compare Quotes
- Configuration Fields

Guest Quotes

Guest quotes let a visitor request and negotiate an offer without first creating a Magento customer account. The quote stores the visitor's email address and uses a private access token in place of account ownership.

How the flow works

1. A visitor adds products to a quote or converts the guest cart into a quote.
2. The extension creates a guest quote with no `customer_id`, assigns a guest quote number, and generates a random access token.
3. The visitor supplies contact and address information and submits the request.
4. Quote emails include a tokenised link that opens the permitted guest quote.
5. The token is preserved during view, edit, submit, message, attachment, and acceptance actions.
6. Depending on the configured acceptance mode, the accepted quote can return to checkout or create a guest order.



Configuration

Open **Stores → Configuration → MageB2B → B2B Quote → Guest Quote Settings**.

Setting	Purpose
Enable Guest Quotes	Allows quote creation and token-based access without login.
Guest Quote Number Format	Defines guest-facing quote numbers. The default is `GQ-{increment_id}`.

Setting	Purpose
Access Token Pattern	Defines the generated token pattern. The default pattern is `guest_[a-zA-Z0-9]{10}`.

If the guest number format differs from the regular quote format, the extension maintains a separate guest counter.

Treat the link like a password

Anyone with a valid token link may be able to access the associated guest quote. Do not publish, log, or place real guest links in screenshots and tickets. Ask customers to forward the link only to authorised colleagues.

Disabling guest quotes prevents token-based guest access in that store scope; it is not merely a switch for creating new requests. Plan the change before disabling the feature with active guest negotiations.

Addresses and shipping

A guest can enter quote-specific billing and shipping addresses. Once saved, those addresses can be selected again within the same quote. They are not a Magento customer address book.

For direct guest order creation, a complete shipping address and a valid shipping method are required for shippable products. See Shipping in Quotes.

Operational checklist

- Use HTTPS on every storefront route.
- Keep token patterns random and sufficiently long; do not use customer names, email addresses, or sequential values.
- Test the submission, status, message, approval, and expiration emails and confirm each link returns to the correct quote.
- Verify that a missing or incorrect token cannot open the quote.
- Test a fresh browser session, not only the session that created the quote.
- Use fictional data in demonstrations and documentation screenshots.

Troubleshooting

The link redirects or denies access

Confirm guest quotes are enabled for the quote's store view and that the complete, unmodified `access_token` parameter is present. Test without a logged-in customer session to reproduce the guest path accurately.

The visitor never receives the link

Verify the guest email stored on the quote, Magento email delivery, the relevant B2B Quote email template, and the mail queue or transport logs. The token can also be inspected by an authorised administrator, but it should not be sent through an insecure public channel.

Order creation fails

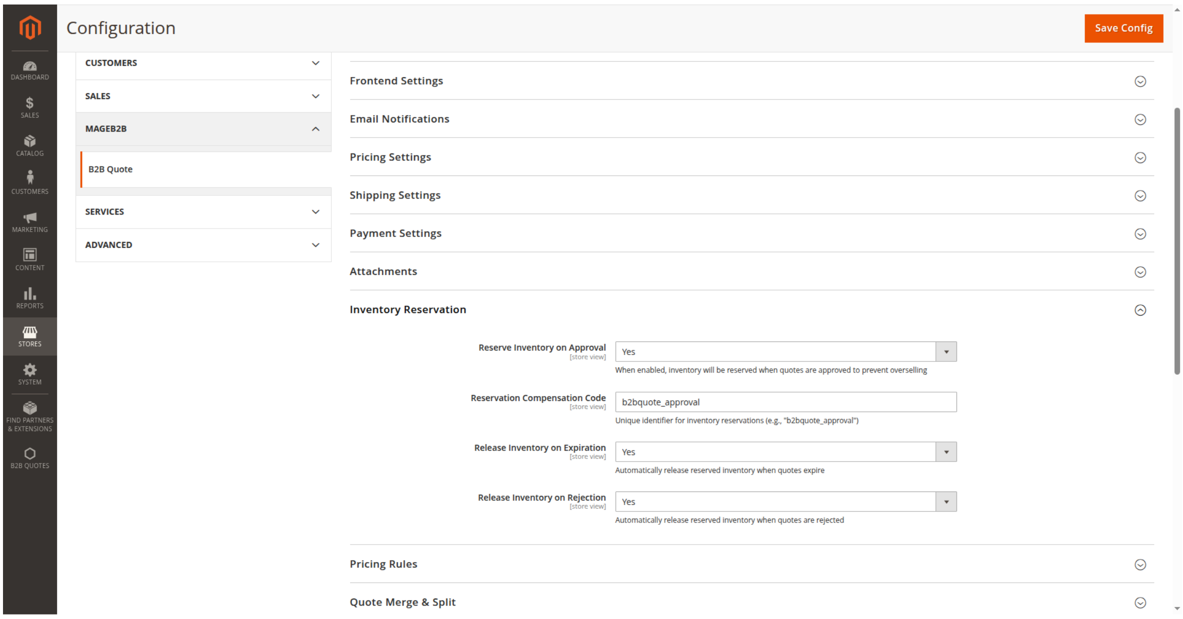
Check address completeness, shipping method availability, product stock and price validation, and the configured acceptance mode.

Related pages

- Frontend Experience
- Email Notifications
- Address, Shipping and Payment
- Cart and Order Conversion

Inventory Reservation

An approved quote can reserve saleable inventory through Magento Multi-Source Inventory (MSI). This reduces the risk that stock promised in an approved offer is consumed by another order before the customer accepts it.



Reservation lifecycle

When **Reserve Inventory on Approval** is enabled, the extension records MSI reservations for the outstanding quantity of eligible quote items as the quote enters the approved state. The reservation is identified with the quote ID and the configured compensation code.

The extension can compensate, or release, that reservation when:

- the quote expires and **Release Inventory on Expiration** is enabled;
- the quote is rejected and **Release Inventory on Rejection** is enabled;
- an order is created from the quote.

Repeated processing does not intentionally reserve the same open quote quantity twice. Operations teams should still monitor Magento's inventory reservation consistency in the same way they do for normal orders.

Configuration

Open **Stores → Configuration → MageB2B → B2B Quote → Inventory Reservation**.

Setting	Purpose
Reserve Inventory on Approval	Enables reservation when a quote becomes approved.
Reservation Compensation Code	Identifies reservations created by this workflow. The default fallback is `b2bquote_approval`.
Release Inventory on Expiration	Compensates an open quote reservation when the quote expires.
Release Inventory on Rejection	Compensates an open quote reservation when the quote is rejected.

Keep the compensation code stable after reservations exist. Changing it can make old reservations harder to match to their compensating entries.

Before enabling it

1. Confirm that Magento MSI is configured and its normal reservation checks are healthy.
2. Decide whether every approved quote should hold stock; long-lived offers can reduce availability for ordinary orders.
3. Configure expiration and rejection release behaviour.
4. Approve a test quote and verify the negative reservation entry.
5. Reject, expire, and convert separate test quotes and verify the corresponding positive compensation entries.
6. Test multiple quotes containing the same SKU.

Troubleshooting

If approval succeeds but no reservation appears, check that the setting is enabled in the quote's store scope, that Magento can resolve the stock for the website, and that the product is managed by MSI. Reservation errors are logged for operations rather than blocking quote approval, so inspect Magento logs as well as the quote status.

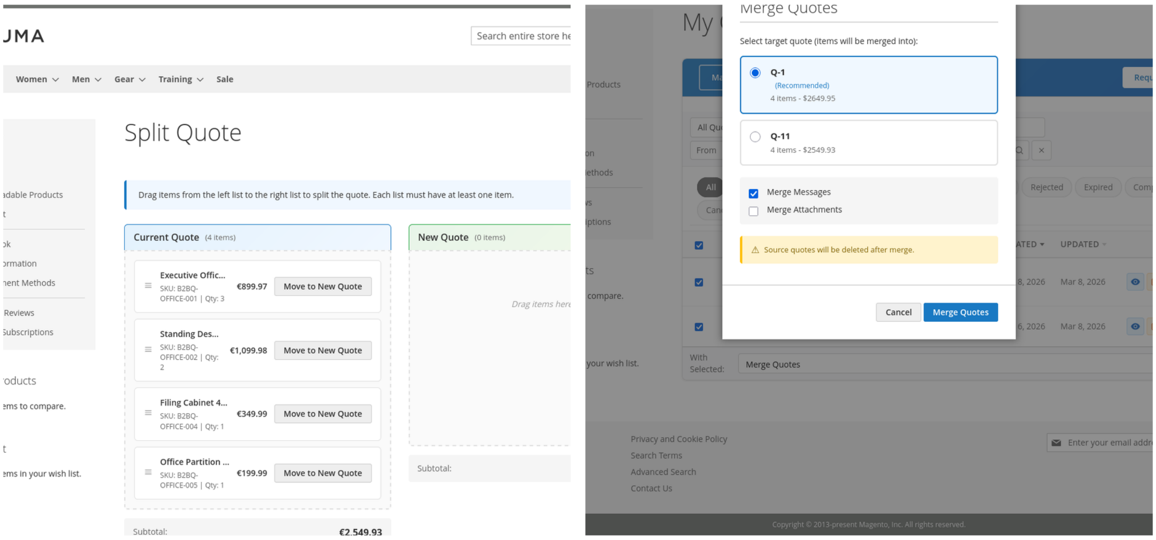
If stock remains reserved, verify the quote reached the expected state, the appropriate release setting is enabled, and the compensation code has not changed since approval.

Related pages

- Quote Lifecycle
- Quote-to-Order Conversion
- Settings Reference

Merge and Split Quotes

Quote merge and split are available in the customer account and in Magento Admin. Customers can organise their own editable quotes. Administrators can perform the same operations when they need to clean up duplicate requests or separate one negotiation into independent offers.



Merge quotes in the customer account

When **Enable Quote Merge (Frontend)** is enabled, a signed-in customer can select at least two compatible quotes from the quote list. The quotes must belong to that customer and remain editable. The same item limit used by the admin operation applies.

The customer chooses the destination quote and whether messages and attachments should be included. The configured defaults preselect those options. The **Delete Source Quotes After Merge** setting controls whether Magento removes the source quotes after a successful merge.

Merge quotes in Magento Admin

From the quote grid, select at least two editable quotes for the same customer and choose the merge action. The extension prevents merges across customers and checks that the combined item count does not exceed the configured maximum per quote.

During the merge, choose whether to include messages and attachments. Configuration can preselect those choices. The **Delete Source Quotes After Merge** setting determines whether the original records are removed after a successful merge.

Before confirming, decide which quote should be the destination and review customer, store, currency, addresses, items, negotiated prices, shipping, payment, expiration, category, tags, project, and related history. A merge is a business decision, not merely a way to shorten the grid.

Split a quote in the customer account

When **Enable Quote Split (Frontend)** is enabled, a customer can open an editable quote and move selected items into a new quote. At least one item must remain in the original quote.

Split a quote in Magento Admin

Open an editable quote and choose **Split Quote**. Select one or more items for the new quote; at least one item must remain in the original. The operation creates one new quote from the selected item group and keeps the remaining items in the current quote.

The feature does not automatically split by warehouse, delivery date, project, or budget owner. An administrator chooses the item lines explicitly, so use the quote context to decide the correct grouping.

After splitting, review both quotes. In particular, confirm totals, addresses, shipping, expiration, and any context that should differ between the two negotiations.

Configuration and permissions

Under **Stores → Configuration → MageB2B → B2B Quote → Quote Merge & Split**, configure:

- **Enable Quote Merge**;
- default inclusion of messages;
- default inclusion of attachments;
- **Enable Quote Split**;
- deletion of source quotes after merge.

These switches control the customer-account actions. Magento Admin has separate ACL resources for merge and split. Give those permissions only to roles responsible for quote administration.

Safer use in production

- Test merge and split on representative quotes before enabling source deletion.
- Keep source quotes when audit or recovery requirements are unclear.
- Do not merge simply because two quote numbers look similar; verify customer ownership.
- Check the maximum quote-item setting before a large merge.
- Review revision history after the operation when merge/split revision events are enabled.

Troubleshooting

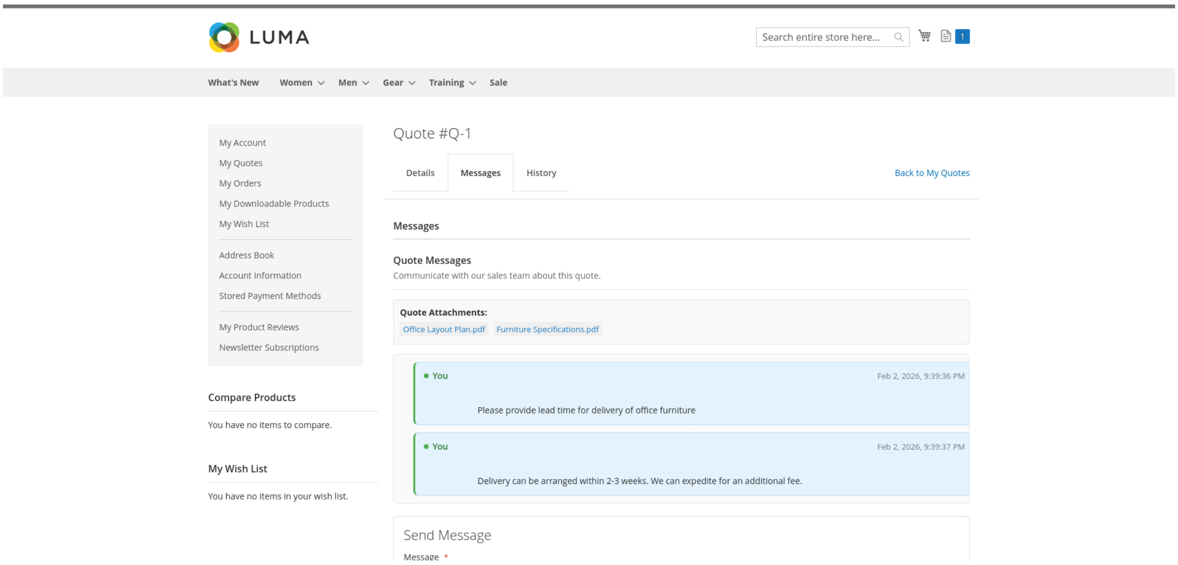
If a customer cannot see an action, check the corresponding frontend setting and confirm the quotes are editable. In Magento Admin, check the administrator's merge or split ACL permission as well. A merge needs at least two quotes for the same customer. A split must leave at least one item in the original quote. Both resulting quotes must stay within the configured item limit.

Related pages

- Quote Management
- Revision Tracking
- Settings Reference

Quote Messaging

Each quote has its own conversation thread so product questions, delivery requirements, counter-offer context, and next steps stay attached to the commercial record.



Typical workflow

1. A customer submits a request and explains an unusual quantity or delivery need.
2. A sales administrator reviews the quote and replies in the thread.
3. Both parties can refer to the same history while prices and statuses change.
4. Message email notifications bring the recipient back to the quote rather than creating a separate negotiation record.

Configuration

Under **Stores → Configuration → MageB2B → B2B Quote → Messaging**:

- **Maximum Message Length** sets the character limit for each message; `0` means unlimited and the default is 5,000.
- **Disable Messaging for Statuses** prevents new messages in selected statuses. Leave it empty to allow messaging throughout the workflow.

Email templates and administrator recipients are configured in the extension's **Email Notifications** section. Customer and administrator message notifications use separate templates.

Good practice

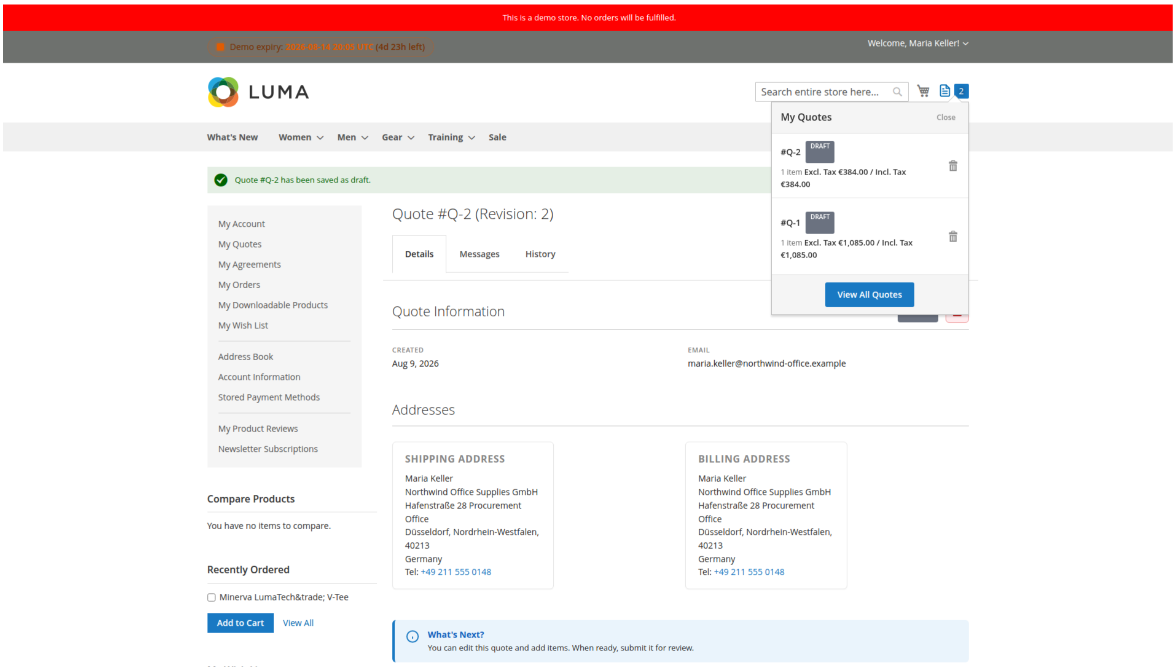
- Keep decisions and quote-specific context in the thread, not only in private email.
- Use status guidance for the next action and messages for the conversation; do not use either as a substitute for the other.
- Disable messaging in final states if the quote must remain a closed record.
- Set a finite message length on public-facing forms.
- Test both customer and administrator notification templates after changing email configuration.

If messages save but email does not arrive, verify Magento email delivery and the message templates independently. If the input is unavailable, check the current status against **Disable Messaging for Statuses**.

See also Email Notifications and Quote Statuses.

Mini Quote

The mini quote is the header dropdown for B2B quote activity. Like Magento's mini cart, it lets a customer check current work and return to a quote without opening the full quote list first.



What it shows

For each displayed quote, the component can show:

- quote number and current status colour;
- item count and creation date;
- grand total when storefront quote prices are enabled;
- a direct link to the quote.

The header data also includes the total number of matching quotes and the number of items in draft quotes. An empty state appears when nothing matches the selected display mode.

For a logged-in customer, the component loads that customer's quotes. For a guest with a valid access token, it displays only the matching guest quote and keeps the token in the link.

Configuration

Open **Stores → Configuration → MageB2B → B2B Quote → Frontend Settings**.

Setting	Purpose
Enable Mini Quote	Enables the customer-data component.
Show in Top Navigation	Adds the quote entry to storefront navigation.
Maximum Quotes to Display	Limits the recent entries shown in the dropdown.
Display Mode	Selects which lifecycle states appear.
Show Prices	Controls whether quote totals are exposed on the storefront.

The display modes are:

- **All Quotes**;
- **All Quotes (Exclude Drafts)**;
- **Only Active Quotes** — in-review, submitted, and accepted states;
- **Only Actionable Quotes** — quotes where customer action is available.

How updates reach the header

The mini quote uses Magento's `b2bquote` customer-data section. Quote actions invalidate or reload that section after changes such as adding or removing items, submitting or accepting an offer, duplicating a quote, or converting a cart.

Because the data is browser-side, clearing only Magento's server cache may not refresh a stale dropdown.

Troubleshooting

The component is missing

Confirm that B2B Quote and **Enable Mini Quote** are enabled for the current store, the visitor's customer group is allowed, and the active theme renders the mini-quote block. Deploy static content after installing or updating the extension.

It shows old information

Reload Magento customer data, clear the relevant browser local-storage section, and check the browser console and network requests. Verify that the quote action completed successfully before expecting the section to change.

A quote is absent

Check the configured display mode and maximum count. An active-only or actionable-only view intentionally hides other states. For a guest, confirm that the current request or session contains the correct access token.

Totals are missing

Check **Show Prices**. The extension intentionally omits total display data when storefront quote prices are disabled.

Related pages

- Frontend Experience
- Guest Quotes
- Quote Lifecycle
- Settings Reference

Order to Quote

Order conversion lets a logged-in customer create a new quote from one of their existing orders — the action is offered on the customer's order detail page. An administrator with quote-save permission can also create a B2B quote from an order via the **Convert to Quote** button on the order view in Magento Admin (**Sales > Orders**, open the order).

The resulting customer quote opens as an editable draft so the customer can review the copied items, change quantities, add requirements, and submit it for pricing. Magento checks the configured maximum number of active quotes before creating it.

The admin action requires the `MageB2B_B2BQuote::quotes_save` permission and opens the new quote in the B2B Quote editor.

Admin and customer use cases

Order to quote is useful when:

- customers reorder similar project requirements
- a previous order needs negotiation before repeat purchase
- sales teams convert historic orders into managed quote workflows
- B2B customers use quotes for budget approval before purchase

Related

- Cart & Order Conversion
- Quote Lifecycle
- Address, Shipping & Payment

Quote PDFs and Layouts

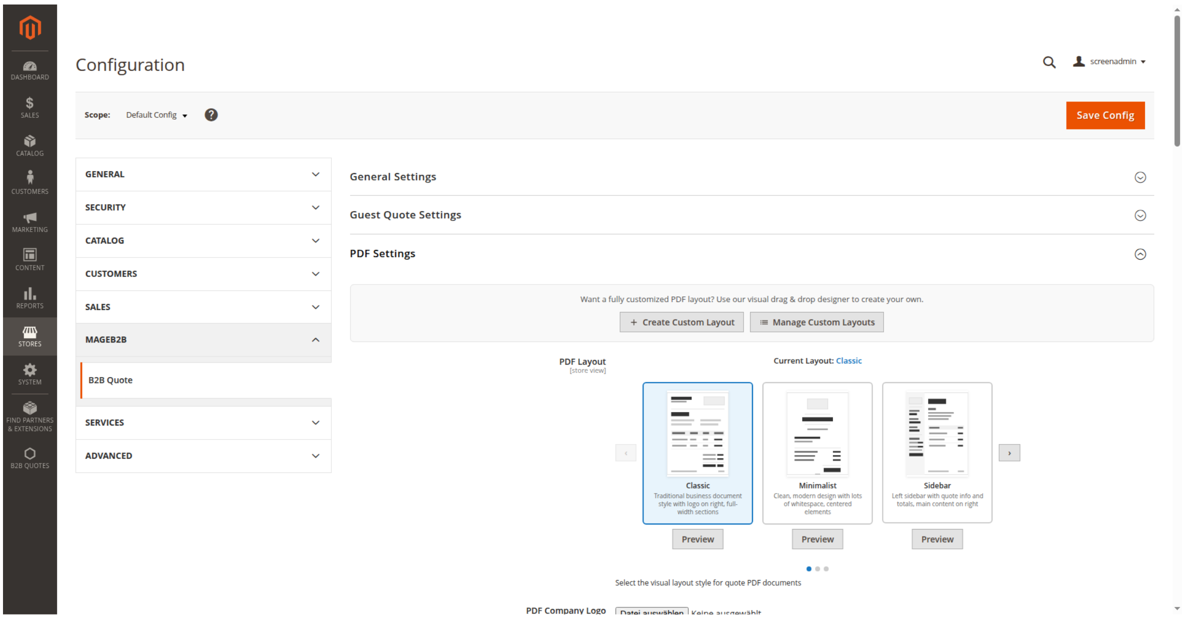
B2B Quote can render a customer-ready PDF from the current quote. The document brings together merchant identity, customer and address data, items, negotiated prices, totals, shipping, validity, and other quote information supported by the selected layout.

Built-in layouts

The base extension includes six layouts:

- **Classic** (`classic`)
- **Minimalist** (`minimalist`)
- **Sidebar** (`sidebar`)
- **Color Block** (`color_block`)
- **Compact** (`compact`)
- **Executive** (`executive`)

Use the visual selector to compare them with representative quote data rather than choosing from the name alone.



Configuration

Under **Stores → Configuration → MageB2B → B2B Quote → PDF Settings**, configure:

- PDF layout;
- company logo, name, address, telephone, and email;
- footer text;
- statuses for which PDF download is restricted;

- whether item notes appear in the document.

Settings are scope-aware, so stores with different legal entities or contact details can use different document branding.

Before publishing a layout

Generate sample PDFs that include:

- a long company and customer address;
- several item types, long product names, item options, and notes;
- discounts, tax, shipping, and a quote fee;
- multiple pages;
- the store's real currency and locale formatting;
- the longest footer and legal text you expect to use.

Confirm that the PDF reflects the saved quote revision customers are meant to receive. Regenerate it after changing pricing or addresses.

Restricting downloads

Use **PDF Download Restricted Statuses** when a document should not be available in drafts or other internal stages. Status restrictions apply to storefront download access; administrator permissions and internal document handling should be reviewed separately.

Custom layouts

Developers can register additional renderers in the PDF layout pool through dependency injection. For a merchant-managed visual editor, reusable layout records, custom fonts, and variable placement, see the PDF Designer Add-On.

Troubleshooting

If the wrong logo or company details appear, check the active website/store scope and clear configuration cache. If content is clipped, reproduce it with the longest real-world data and compare another built-in layout. If customers cannot download a PDF, inspect the quote's current status and the restricted-status setting.

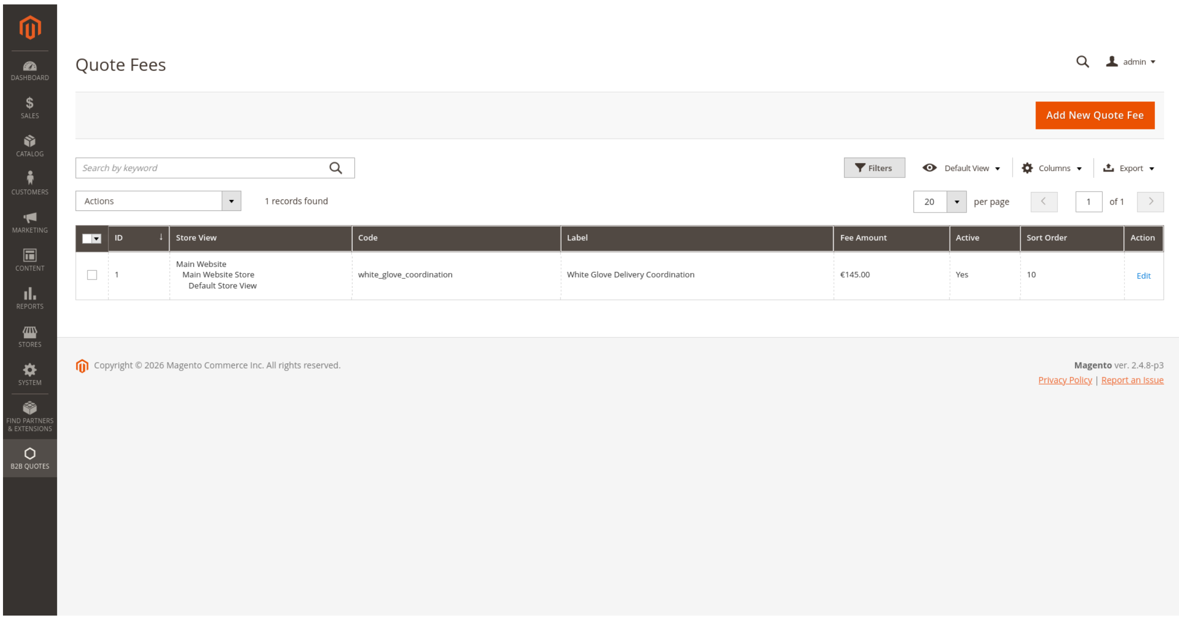
Related pages

- PDF Designer Add-On
- Email Notifications
- Settings Reference

Quote Fees

Quote fees add a clearly labelled fixed charge to an offer. They suit costs that belong to the negotiated transaction but should not be hidden in a product price or shipping rate, such as special packaging, expedited handling, or documentation.

A fee can be selected by an administrator or assigned by a workflow rule. Its label and amount appear in quote totals and are carried into the resulting order, including the related invoice and credit-memo totals.

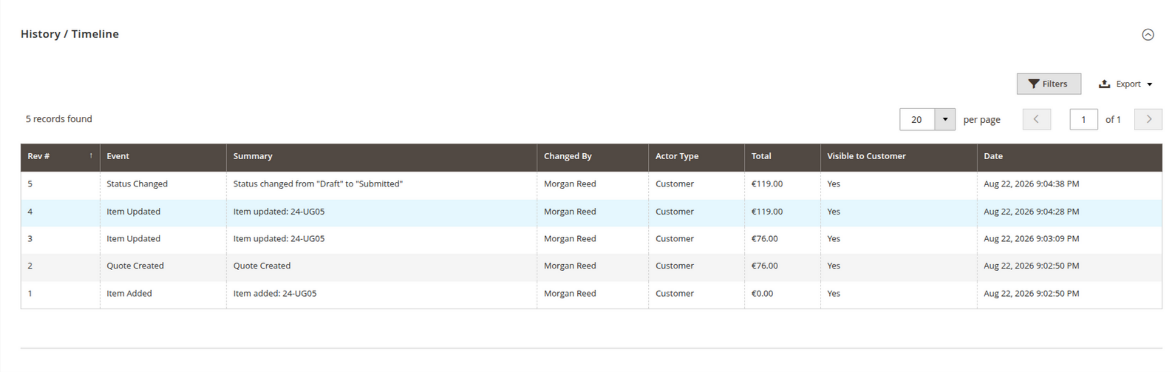


Tax treatment is configurable per store scope. Before using a fee in production, confirm whether its amount includes tax and test the result for the countries, customer groups, invoices, and refunds used by your store.

For setup fields, tax behaviour, automation, and a launch checklist, see Manage Quote Fees. See also Quote totals and calculation for the order in which fees contribute to the grand total.

Revision Tracking

Revision tracking stores snapshots of a quote at selected business events. It gives administrators a timeline of how the offer changed instead of showing only its latest totals and items.



Rev #	Event	Summary	Changed By	Actor Type	Total	Visible to Customer	Date
5	Status Changed	Status changed from "Draft" to "Submitted"	Morgan Reed	Customer	€119.00	Yes	Aug 22, 2026 9:04:38 PM
4	Item Updated	Item updated: 24-UG05	Morgan Reed	Customer	€119.00	Yes	Aug 22, 2026 9:04:28 PM
3	Item Updated	Item updated: 24-UG05	Morgan Reed	Customer	€76.00	Yes	Aug 22, 2026 9:03:09 PM
2	Quote Created	Quote Created	Morgan Reed	Customer	€76.00	Yes	Aug 22, 2026 9:02:50 PM
1	Item Added	Item added: 24-UG05	Morgan Reed	Customer	€0.00	Yes	Aug 22, 2026 9:02:50 PM

Events you can track

The configuration can create revisions for:

- quote creation, submission, approval, rejection, acceptance, and expiration;
- general status changes;
- item additions, updates, removals, and grouped item modifications;
- pricing updates, customer counter-offers, administrator offers, and applied discounts;
- messages, address changes, and shipping changes;
- order creation;
- rollback, merge, and split operations.

Choose events that matter to your audit and support process. Enabling every event produces the richest history but also increases storage and can add noise during an active negotiation.

What a revision preserves

A revision records quote-level commercial data and snapshots of the associated items at that point in time. The timeline can therefore show not only that an event occurred, but what the offer contained when it occurred.

Revision history complements messages and status guidance; it does not replace them. A numeric change can be visible in a snapshot while the reason for it belongs in a note or message.

Safe rollback

An administrator can restore an editable quote from a selected revision when the rollback action is permitted. The operation writes the quote and its items as one transaction, then records the rollback as a new revision. It does not silently restore a deleted product or bypass the current quote permissions.

If saving the rollback revision fails, the current quote and its items remain unchanged. Reload the quote and history before retrying. This matters when a rollback is used to correct a mistaken offered price or item change: verify both the current totals and the new history entry after the action.

Retention

Under **Stores → Configuration → MageB2B → B2B Quote → Revision Tracking**:

- **Enabled Events** selects the events that create snapshots;
- **Enable Revision Cleanup** allows scheduled removal of old, non-current revisions;
- **Revision Retention Days** defines the retention period.

The cleanup cron preserves the current revision and avoids deleting a parent revision that is still needed by a retained child. Set retention to match your commercial and legal requirements before enabling cleanup.

See Cron Jobs for scheduler requirements.

Operational guidance

- Enable revisions before testing a workflow so the complete sequence is visible.
- Include pricing, status, item, and order events when the history is used to investigate quote-to-order differences.
- Use a longer retention period where quotations form part of a contractual or regulated record.
- Verify database growth after enabling high-frequency events such as item and message changes.
- Export or retain records outside Magento when your policy requires preservation beyond the configured cleanup period.

Troubleshooting

If a change does not appear, confirm its event is selected in the quote's store scope and that the action actually completed. If old revisions remain, check that Magento cron is running, cleanup is enabled, and the retention value is greater than zero.

Related pages

- Quote Lifecycle
- Merge and Split Quotes
- Messaging
- Cron Jobs

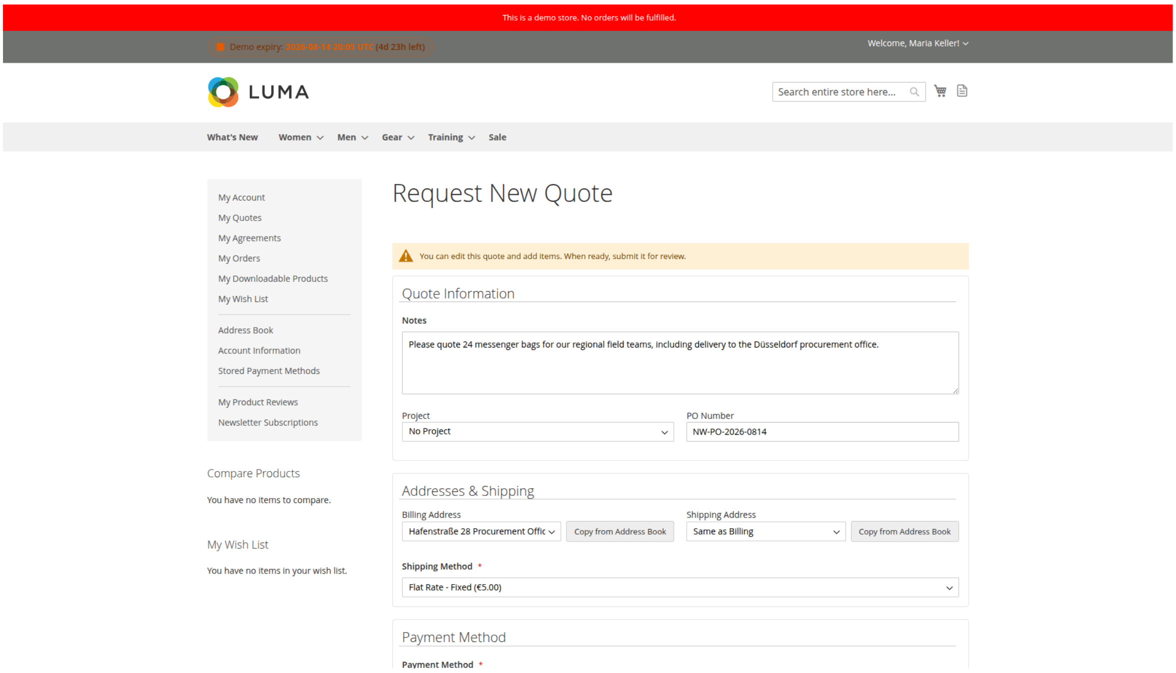
Shipping in Quotes

B2B Quote can collect an address, request live Magento shipping rates, store the chosen method and amount, and carry that selection into quote-to-order processing. This lets delivery cost become part of the offer instead of being discovered only at checkout.

Customer flow

During quote creation or editing, the customer chooses or enters billing and shipping addresses. When a shipping address is available, the storefront can estimate the permitted Magento shipping methods for that address and the current quote contents.

The selected method, description, and amount are stored on the B2B quote and included in the displayed totals. If the address, items, or quantities change, refresh the rates and totals before submitting the offer.



Configuration

Open **Stores → Configuration → MageB2B → B2B Quote → Shipping Settings**.

Setting	Purpose
Shipping Required	Requires shipping information in the quote flow.
Free Shipping Threshold	Makes shipping free when the quote grand total reaches the configured amount; `0` disables this threshold.
Disallowed Shipping Methods	Removes selected methods from B2B quotes and from checkout when a quote is converted to a cart.

The extension uses Magento's configured carriers and rates. It does not make an unavailable carrier available by itself.

Free shipping threshold

When a positive threshold is configured, the storefront can show progress toward free shipping. Once the relevant quote total reaches the threshold, the resulting shipping amount is zero while the selected shipping method remains identifiable.

Test the threshold around its exact boundary and after discounts. Do not assume a catalogue or cart price rule uses the same total definition as the B2B Quote setting.

Quote-to-order checks

Before relying on direct order creation, test that:

- the shipping address belongs to the quote and contains all required fields;
- the selected method is still available for the destination and products;
- the method is not on the B2B Quote disallow list;
- tax-inclusive and tax-exclusive shipping totals display as expected;
- a guest quote has a complete shipping address;
- a converted cart retains the permitted shipping choice or guides the customer to select a replacement.

If a stored method later becomes unavailable or disallowed, the extension can clear it so a valid method must be chosen rather than silently retaining an invalid rate.

Troubleshooting

No rates appear

Verify the shipping address, Magento carrier configuration, destination restrictions, product types and weights, website/stock assignment, and the B2B Quote disallow list. Test the same address and products through normal Magento checkout to separate a carrier problem from a quote problem.

Totals do not change

Re-estimate shipping after changing the address or items and ensure the selected method was persisted. Clear Magento caches and inspect the shipping-estimation browser request if the interface does not refresh.

Submission asks for shipping

Shipping Required is enabled but the quote does not yet have a valid shipping address and method. Complete both before submitting.

Related pages

- Address, Shipping and Payment
- Cart and Order Conversion
- Settings Reference

Workflow Rules

Workflow rules automate a defined response to something that happens during a quote. They can route a large request for review, notify the right people, add an audit note, or update a quote without relying on someone to remember every step.

Available events

A rule can start when a quote is:

- created, submitted, approved, rejected, expiring soon, expired, or converted to an order;
- involved in price negotiation or a counter offer;
- moved to another status;
- given a new message.

The event only starts evaluation. The rule still runs its actions only when all configured conditions are satisfied.

What conditions can inspect

Conditions can use quote amounts, item count, quantities, dates, customer, project, current state or status, days until expiry, address details, and item or product data. Combine them with **all** or **any** logic.

Prefer several clearly named rules over one large condition tree that mixes unrelated business processes. A sales administrator should be able to understand why a rule ran by reading its name and conditions.

Available actions

A matching rule can:

- change the quote status;
- send a selected Magento email template;
- apply a discount amount;
- set or clear a configured quote fee;
- set, extend, or clear the expiration date;
- add or remove a tag;
- add an administrator or customer note.

Actions run in their configured order. Test the full sequence when one action changes data used by another.

Example: commercial review for large quotes

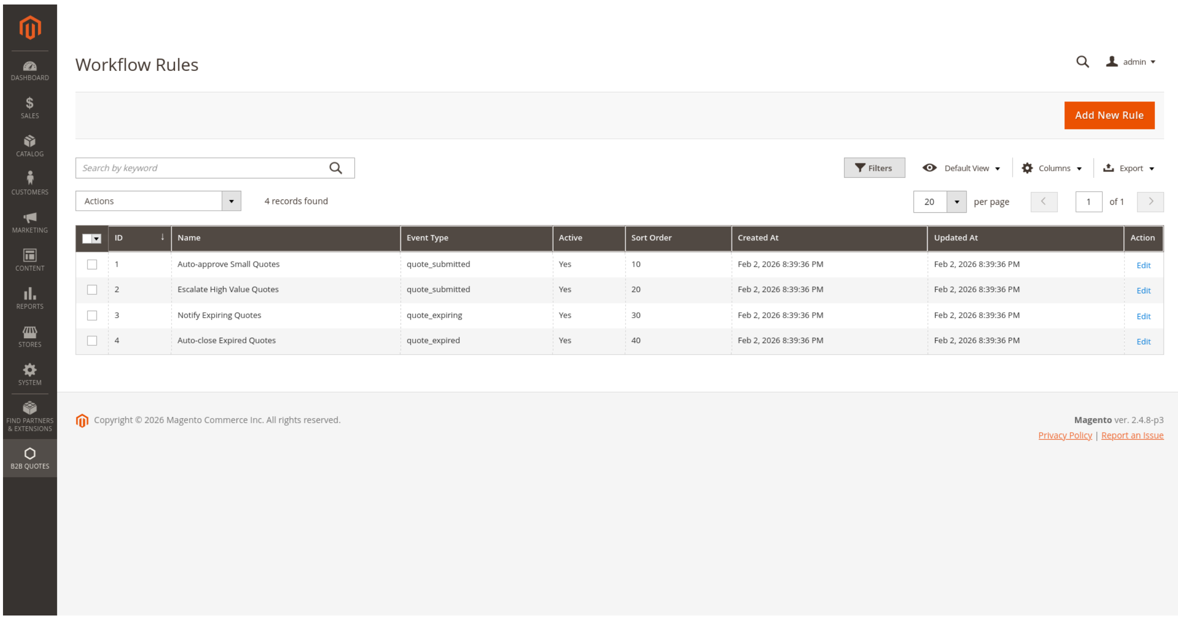
A rule could use:

- event: **Quote Submitted**;
- condition: quote subtotal is at least 10,000;
- actions: move the quote to **Commercial Review**, add an administrator note, and send an internal notification template.

Ordinary submissions keep their normal route, while the high-value quote carries a visible status and audit note.

Build and test a rule

1. Open **B2B Quotes > Workflow Rules**.
2. Create the rule and leave it inactive.
3. Choose the exact event and set a clear sort order.
4. Add the narrowest conditions that describe the case.
5. Add actions in their intended execution order.
6. Exercise the event with a realistic quote.
7. Verify status, totals, fees, tags, notes, history, and email delivery.
8. Activate the rule after the observed result matches the business process.



Status validation and loops

The **Transition Validation** setting can require workflow status changes to follow the same transition map as customer and administrator actions. Enable it when automation must obey the normal process.

Be especially careful with **Status Changed** and **Message Added** rules. A status action or note can cause more processing. Use exact source-state conditions, choose a target that cannot immediately match the same rule again, and inspect quote history after every test.

For field-by-field administration instructions, see Manage Workflow Rules.

Related

- Manage Workflow Rules
- Quote Lifecycle
- Status Transitions
- Email Notifications

Quote workflow from draft to order

This page follows one quote through the complete B2B process. Use it as the operating checklist for a new store, then use the linked pages for individual settings and administration screens.

Before the first quote

Confirm the following in the selected store view:

- the customer group is allowed to use quotes;
- a default status exists for each state used by the workflow;
- customer and administrator transitions exist for submit, review, approval, rejection, acceptance, and order creation;
- the quote item limit, expiration policy, price visibility, and customer counter-offer settings match the sales process;
- shipping and payment restrictions are tested with the products used by the sales team;
- notification templates, sender identities, and cron are working.

Administrators need the matching admin role permissions (ACL resources) for the actions they perform. A menu entry being visible does not grant service authorization. See Admin permissions.

Create a draft

Product page

An eligible customer selects **Add to Quote** on a product page. The storefront creates or reuses a draft and adds the product with its SKU, configured options, quantity, catalogue price, and any customer note accepted by the form. Configurable product data must be complete before the item can be added.

Cart

When cart conversion is enabled, the customer selects the request-a-quote action in the cart. The current cart lines are copied into a draft and the customer is sent to the quote flow. The minimum cart amount, eligibility, and whether the original cart is cleared are controlled by configuration. See Cart to quote.

New quote

The customer can also create an empty draft from **My Quotes** and add lines later. An empty draft can be saved, but it cannot be submitted or accepted. The configured maximum item count is checked when items are added and when quotes are merged.

Review and edit items

The quote editor keeps these values separate:

Value	Meaning
Catalogue price	The product price copied when the item was added.
Offered price	The merchant's negotiated unit price. It becomes the effective line price.
Customer counter price	A price proposed by the customer during negotiation.
Quantity	The requested quantity. Totals are recalculated after a change.
Item note	Context for the line, such as a specification or delivery request.

Customers can edit quantities, notes, and counter prices only when the current status and frontend settings allow it. Administrators can edit offered prices, quantities, notes, and commercial adjustments when their ACL and the quote state permit editing.

Removing an item recalculates the quote. Deleting the quote removes the whole request and its associated records, subject to permissions. Neither action is the same as changing the workflow status.

Addresses, shipping, and payment

Set the billing and shipping address before selecting a rate. A quote stores its own address snapshot, so editing it does not change the customer's normal address book. Guests keep the address on the token-protected quote.

The shipping method must be available for the quote's products, destination, store, and current configuration. If the destination or products change, get a new rate instead of relying on the old amount. Payment selection is validated against the store, country, currency, order total, and the B2B Quote payment restrictions.

For direct order creation, a complete address, valid shipping method for shippable products, and valid payment method are required. Add-to-cart acceptance can leave the final checkout selection to Magento, but B2B Quote restrictions still apply. See Address, shipping and payment.

Submit for review

The customer submits the quote from the storefront. Submission validates that the quote has at least one item, has a grand total greater than zero, is not past its expiration date, and has a customer transition from the current status to the submitted state. A required note must be supplied when the matching transition says so.

On success the status-change side effects run after the save commits. They can create a revision and send the configured notifications. If the transition is missing or the quote is incomplete, no submitted state is written.

Review and negotiate

An administrator opens the submitted quote, checks the item options and quantities, and sets an offered price where needed. The administrator can also adjust shipping, discounts, fees, and the expiration date. Each total should be checked after the commercial changes.

The customer counter-offer action writes the proposed price on the item and recalculates totals. The next status and whether the customer can negotiate again are determined by the configured transition and frontend settings. Keep the reason for a material price change in a visible message. Revisions provide the before-and-after snapshot; they do not replace the message thread.

See Price negotiation, Quote messaging, and Revision tracking.

Approve and accept

The administrator approves the final offer through an admin transition. An approval can trigger inventory reservation, workflow rules, a revision, and email notifications according to the selected configuration. Approval is not an order.

The customer accepts only when the current status has a customer transition to an accepted status and the quote is still valid. The store can use one of two acceptance modes:

Mode	Result
Create order	Magento creates an order from the quote inside a transaction.
Add to cart	The accepted lines are added to the customer's cart for normal checkout.

If customer choice is enabled, the customer selects the mode at acceptance. For add-to-cart acceptance, the store can clear the existing cart first or keep its lines. Confirm that choice before the customer checks out.

Order conversion checks and rollback

Direct order creation loads the products again and validates product existence, enabled state, stock policy, current price policy, address, shipping, payment, expiration, and the system transition into the ordered state. It applies the offered price when the configured policy permits quoted prices. A policy can instead use the current catalogue price or block the conversion when the price changed.

The conversion is transactional. If a product is missing, stock is not available, a method is no longer valid, or another validation fails, the conversion does not leave a half-created order. When acceptance had changed the status first, the previous status is restored as well. Check the quote and order grid before retrying a request.

For a complete validation matrix see Cart and quote-to-order conversion.

Status and actor matrix

The fixed state describes the lifecycle. The store-scoped status label and transition configuration decide the exact buttons visible to each actor.

Operation	Typical actor	Required condition
Create or edit draft	Customer or admin	Quote is editable and actor owns the required ACL or quote.
Submit	Customer	Items, positive total, valid expiry, customer transition.
Review, offer, approve, reject	Admin	Admin transition, ACL, and any required note.
Counter-offer	Customer	Negotiation is enabled and the customer transition permits it.
Accept	Customer or guest token holder	Valid quote and customer or token transition to accepted.
Create order	System after acceptance, or permitted admin action	Ordered transition and all order validation checks pass.
Expire	System	Expiration date has passed and the expiry job runs.

Ordered, expired, and cancelled states are terminal in the base lifecycle. Custom labels map to an existing state; they do not create a new lifecycle state. See Quote statuses and Status transitions.

Guest quotes

Guest quotes use an access token rather than a customer account. The token holder can perform only the actions enabled for the quote's current status. Direct order creation also requires Magento guest checkout and a complete guest address. Never place a live token in a screenshot, support ticket, or client-side log. See Guest quotes.

After acceptance

Review the accepted quote, order or cart, and any related email and revision. For an order, compare item prices, tax, shipping, fees, customer identity, and payment. For a cart, confirm whether pre-existing lines were retained and complete checkout normally.

An approved quote can also become an agreement. An active agreement can start a new call-off draft with the agreed item prices. Creating that draft does not consume agreement quantity, so the fulfilment process must record consumption before treating the displayed balance as committed. See Agreements and call-offs.

When the flow stops

Use the quote status and revision history to locate the last successful step. Then check the matching condition instead of forcing a database status:

- empty or zero-total quote: add a valid item and recalculate;
- expired quote: set a new valid expiry only if the business process allows it;
- missing action: inspect the source status, actor, store scope, and ACL;
- stale shipping or payment: refresh rates and select an allowed method;
- upload or message failure: check status restrictions and configured limits;
- conversion failure: verify product, price, stock, address, shipping, payment, and whether an order or cart was already created.

Related operational checks are collected in Common issues.

Add-Ons

The base B2B Quote package covers the quote workflow in Magento Admin and the storefront. Install an add-on only when the project needs an additional integration, storefront implementation, document workflow, or data-transfer path.

Add-on	Install it when you need	Composer package
REST API	Magento REST endpoints for customer, guest, and administrator quote operations	`mageb2b/b2b-quote-api`
GraphQL	Typed quote queries and mutations for a GraphQL storefront or integration	`mageb2b/b2b-quote-graph-ql`
Hyvä Theme	B2B Quote storefront components on a Hyvä-based store	`mageb2b/b2b-quote-hyva`
CSV Import/Export	Repeatable transfer of quote entities through Magento Import/Export or the command line	`mageb2b/b2b-quote-importexport`
OpenSign	A digital signature before an approved quote can be accepted	`mageb2b/b2b-quote-opensign`
PDF Designer	Custom quote-PDF layouts beyond the standard layouts in the base module	`mageb2b/b2b-quote-pdfdesigner`
Sample Data	Coherent demo records for implementation, training, or evaluation	`mageb2b/b2b-quote-sample-data`

Base module or add-on?

You do not need an add-on for the normal customer request, negotiation, administrator review, approval, PDF download, or quote-to-order workflow. Those capabilities belong to `MageB2B_B2BQuote`.

The add-ons do not replace the base module. Each package declares `mageb2b/b2b-quote` as a dependency and Composer must resolve compatible package constraints in the same Magento installation.

REST, GraphQL, or both?

Choose the API that matches the client:

- Use **REST** for integrations already built around Magento Web API routes and ACL resources.
- Use **GraphQL** for a GraphQL storefront or client that benefits from a typed schema and quote-specific mutations.
- Install both only when separate clients genuinely use both interfaces.

Neither API add-on creates a remote procurement protocol, CRM connector, webhook platform, or generic rate-limiting layer. Those concerns need their own integration design.

Hyvä storefronts

The Hyvä package changes storefront presentation; it does not change the commercial quote data model or the administrator workflow. Install it in addition to the base package, include its sources in the Hyvä Tailwind build, and rebuild the theme assets after installation.

Data and document add-ons

The **CSV Import/Export** package is intended for controlled data movement and migration. It is different from the quote editor's compact item CSV tool.

The base module already generates quote PDFs. **PDF Designer** is for teams that need editable custom layouts and variables. **OpenSign** adds a separate digital-signature lifecycle for approved quotes. These two add-ons solve different document requirements and can be evaluated independently.

Safe evaluation with sample data

The Sample Data package writes demo customers, products, rules, quotes, projects, and related records. Use it only in a local, demo, or disposable staging environment. Its reset command is destructive to the records that belong to its fixture set.

Installation sequence

For any add-on:

1. Confirm that the base B2B Quote module is installed and working.
2. Require the selected Composer package from the SoftwareSilo repository.
3. Enable its exact Magento module name shown on the add-on page.
4. Run `setup:upgrade` and the deployment steps required for the environment.
5. Verify one complete workflow owned by that add-on before enabling it for customers.

See the individual add-on guide for exact commands, configuration, permissions, and verification steps.

REST API Add-On

Install the optional **B2B Quote REST API add-on** when another system needs to work with quotes through Magento Web API. The package declares the routes; the base B2B Quote module provides the service implementations and business rules.

- Package: `mageb2b/b2b-quote-api`
- Magento module: `MageB2B_B2BQuoteApi`

Without this add-on, the REST endpoints documented below are not available. GraphQL is provided by the separate GraphQL Add-On.

Installation

Configure the SoftwareSilo Composer repository if it is not already available, then install the package:

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

See the installation guide for where to find the repository placeholders and access token (Account > Licenses).

Enable the Magento module and apply the setup changes:

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

The add-on has no separate API configuration screen. Create and authorize administrator integrations through Magento's standard integration management.

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}"
```

The examples below show route paths. Request and response bodies follow Magento's generated service-contract schema. Check the target store's Swagger/OpenAPI output or service metadata before implementing a client.

Endpoint Groups

Admin (ACL-protected)

Method	URL	Purpose
`GET`	`/V1/b2bquote/quotes`	List quotes (any customer)
`GET`	`/V1/b2bquote/quotes/{quoteId}`	Get quote by id
`POST`	`/V1/b2bquote/quotes`	Create draft quote
`PUT`	`/V1/b2bquote/quotes/{quoteId}`	Save/update quote
`DELETE`	`/V1/b2bquote/quotes/{quoteId}`	Delete quote
`POST`	`/V1/b2bquote/quotes/{quoteId}/status`	Change status (admin flow)
`POST`	`/V1/b2bquote/quotes/{quoteId}/pricing/apply`	Apply pricing rules
`POST`	`/V1/b2bquote/quotes/{quoteId}/workflow/apply`	Apply workflow rules
`POST`	`/V1/b2bquote/quotes/{quoteId}/approve`	Approve a quote
`POST`	`/V1/b2bquote/quotes/{quoteId}/reject`	Reject a quote
`POST`	`/V1/b2bquote/quotes/{quoteId}/recalc`	Recalculate quote totals
`POST`	`/V1/b2bquote/quotes/{quoteId}/split`	Split a quote into new quotes
`POST`	`/V1/b2bquote/quotes/{targetQuoteId}/merge`	Merge source quotes into the target quote

Method	URL	Purpose
`GET`	`/V1/b2bquote/quotes/{quoteId}/history`	Read quote revision history

Customer (ownership checked)

Method	URL	Purpose
`GET`	`/V1/b2bquote/me/quotes`	List my quotes
`GET`	`/V1/b2bquote/me/quotes/{quoteId}`	Get my quote
`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
`POST`	`/V1/b2bquote/quotes/{quoteId}/shipping-method`	Set the shipping method
`POST`	`/V1/b2bquote/quotes/{quoteId}/payment-method`	Set the payment method
`POST`	`/V1/b2bquote/quotes/{quoteId}/items/{itemId}/negotiate`	Submit an item price negotiation

Guest (token-based)

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

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

How authorization is applied

- Administrator and integration routes declare a specific `MageB2B_B2BQuote::*` ACL resource in `webapi.xml`. Grant only the resources the integration needs.
- Customer routes use Magento's `self` resource and call ownership-aware service methods. A valid customer token cannot manage another customer's quote.

- Guest routes are declared `anonymous`, but the quote access token is the authorization secret for that quote. Treat token URLs as sensitive and do not log or expose them unnecessarily.
- A valid token does not bypass quote state, access configuration, accept mode, or transition validation.

Customer example

List the authenticated customer's quotes:

```
curl -X GET "https://your-store.com/rest/V1/b2bquote/me/quotes" \
  -H "Authorization: Bearer ${CUSTOMER_TOKEN}" \
  -H "Content-Type: application/json"
```

Keep tokens outside shell history and application logs. The variable name above is illustrative; use your deployment's secret-management approach.

Safe request order

For a customer integration, use the same order as the storefront:

1. `GET /V1/b2bquote/me/quotes` and select an owned quote;
2. add or update items with `product_id`, `buy_request`, and `qty`, or remove an item by quote and item ID;
3. set `billing` and `shipping` address objects;
4. set the shipping method code and, when required, the payment method code;
5. send messages, attachments, or a customer counter price;
6. submit the quote, then accept it with the required accept mode.

The service contract recalculates totals after item and commercial changes. Read the quote again after each mutation and use the returned `updated_at` and status before sending the next write. An ownership check is performed by the customer methods, so an ID from another customer must not be treated as an empty result.

Canonical request shapes

The exact JSON wrapper is generated by Magento Web API. The following fields are the service-contract payload, not a promise that every custom extension will accept additional fields:

```
{
  "quoteId": 42,
  "productId": 1001,
  "buyRequest": {
    "sku": "office-chair",
```

```
    "name": "Office chair",
    "price": 199.00,
    "super_attribute": {"color": "black"}
  },
  "qty": 10
}
```

For item updates, use `qty`, `offered_price`, `customer_counter_price`, and `notes`. For addresses use the quote address fields such as `firstname`, `lastname`, `street`, `city`, `region`, `postcode`, `country_id`, and `telephone`. The shipping and payment calls receive their method code. Inspect the generated Swagger schema for the surrounding interface parameter names before serializing the request.

The accept call accepts `create_order` or `add_to_cart` according to the base service contract and store configuration. Its integer response identifies the created order in `create_order` mode or the active cart in `add_to_cart` mode.

Idempotency and retries

The add-on does not add a separate idempotency key. A timeout after a mutation is ambiguous. Read the quote and order/cart state before retrying acceptance, and use a client-side request ID in your integration logs. A retry of an item add or message post can create a duplicate even if the first response was not received.

Errors and diagnostics

Code	Description
`400`	The payload or business input is invalid
`401`	The bearer token is missing, expired, or not accepted for the route
`403`	The integration lacks the declared ACL resource or the actor cannot perform the operation
`404`	The quote or related entity is not available to that context

Magento serializes service exceptions according to its Web API behavior. Do not build client logic around an undocumented assumption that every invalid transition returns one specific status code; inspect the error body and verify the target Magento API schema.

This add-on does **not** add a separate B2B Quote rate limiter, rate-limit response headers, configurable quote webhooks, or a `B2B Quote > API` configuration group. Infrastructure-level limits from a CDN, WAF, reverse proxy, or another Magento module can still apply.

When a call fails:

1. Confirm the route exists in the target store's generated API schema.
2. Confirm the token type matches the route: administrator/integration, customer, or guest access token.
3. Check the exact ACL resource for integration routes.
4. Check ownership and the quote's current state/status.
5. Reproduce with a read operation before retrying a mutation.
6. Review Magento's `var/log/system.log` and `var/log/exception.log` for the corresponding request time.

Related

- Quote Lifecycle
- Quote Management
- Admin Permissions (ACL)
- Guest Quotes
- GraphQL Add-On

GraphQL Add-On

Install this add-on when a PWA, mobile app, or another GraphQL client needs to work with B2B Quote. It is separate from the REST add-on and requires the base `mageb2b/b2b-quote` package.

Package: `mageb2b/b2b-quote-graph-ql`

Magento module: `MageB2B_B2BQuoteGraphQl`

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-graph-ql:*
```

See the installation guide for where to find the repository placeholders and access token (Account > Licenses).

2) Enable module + run setup

```
php bin/magento module:enable MageB2B_B2BQuoteGraphQl
php bin/magento setup:upgrade
php bin/magento cache:flush
```

Verify that Magento sees both modules:

```
php bin/magento module:status MageB2B_B2BQuote
MageB2B_B2BQuoteGraphQl
```

If your production build compiles dependency injection and static assets, run those normal deployment steps after enabling the package.

Authentication contexts

- `customerB2BQuotes`, `customerB2BQuote`, `customerB2BQuoteProjects`, and customer mutations require a signed-in customer context. Send a Magento customer bearer token.
- `guestB2BQuote` and `acceptGuestB2BQuote` use the guest quote access token.
- Broad queries such as `b2bQuotes` and administrative mutations such as `approveB2BQuote` are intended for an authorized administrator or integration context.

Ownership and transition validation still apply. GraphQL does not bypass the base module's customer-group, quote-access, or workflow rules.

Customer queries

The customer list is paginated:

```
query MyQuotes {
  customerB2BQuotes(pageSize: 10, currentPage: 1) {
    total_count
    items {
      id
      increment_id
      status
      state_code
      grand_total
      expires_at
      updated_at
    }
    page_info {
      current_page
      page_size
      total_pages
    }
  }
}
```

Fetch one owned quote with `customerB2BQuote(id: Int!)`. Use `guestB2BQuote(access_token: String!)` only for the tokenized guest flow.

Available query groups

The installed schema provides query fields for:

- customer, guest, and administrator quote retrieval
- tags and popular tags
- categories and active categories
- messages and attachments
- projects, including customer-owned projects
- pricing rules and quote fees
- statuses, transitions, workflow rules, revisions, and workflow states

Use GraphQL schema introspection in the target Magento environment for the complete field and input definitions. This keeps client work aligned with the exact installed schema.

Customer mutations

Customer operations include creating and submitting a quote, adding or updating items, adding messages, setting addresses, choosing shipping and payment methods, negotiating an item price, recalculating totals, applying pricing rules, accepting a quote, and supported merge/split operations.

Use the mutations in this order when building a client:

1. `createB2BQuote` or an existing quote from `customerB2BQuotes`;
2. `addB2BQuoteItem`, followed by `updateB2BQuoteItem` or `removeB2BQuoteItem` as needed;
3. `setB2BQuoteAddresses`, `setB2BQuoteShippingMethod`, and `setB2BQuotePaymentMethod`;
4. `addB2BQuoteMessage` and `negotiateB2BQuoteItemPrice`;
5. `submitB2BQuote`, then `acceptB2BQuote` after the approved status is returned.

Read the returned quote after every mutation. The resolver applies ownership, status transition, expiration, and configuration checks from the base service. GraphQL input validation does not make a quote eligible for submission or acceptance by itself.

Example message mutation:

```
mutation AddQuoteMessage {
  addB2BQuoteMessage(
    input: {
      quote_id: 42
      message: "Please confirm whether the quoted delivery date
includes installation."
      is_visible_on_frontend: true
      notify_customer: false
    }
  ) {
    message {
      id
      message
      created_at
    }
    quote {
      id
      increment_id
      updated_at
    }
  }
}
```

Administrator and integration mutations

The schema also contains operations to approve or reject a quote, apply workflow rules, and assign or remove tags. Use these only with an authentication context accepted by the corresponding resolver and with the same governance you apply to Magento Admin integrations.

Administrative fields and mutations are not a customer-side shortcut. Keep them on a separate integration client, grant the smallest ACL scope, and do not expose internal quote IDs or guest access tokens in a public PWA state.

Attachments and revisions

The quote schema exposes attachment and revision records for contexts that are authorized to read them. It does not provide an attachment-upload mutation. Upload new files through the storefront, Magento Admin, or the REST add-on, then use GraphQL to read the resulting attachment records. Revisions are read-only snapshots unless the corresponding administrative rollback operation is available in the target schema and the caller has its ACL permission.

Troubleshooting

The customer query returns an authorization error

Confirm that the request includes a current customer token and that the quote belongs to that customer. An Admin integration token is not interchangeable with a customer token for ownership-based fields.

A field is missing from the schema

Check that `MageB2B_B2BQuoteGraphQl` is enabled, clear Magento's configuration cache, and inspect the schema in the same environment used by the client. Do not rely on an IDE's cached schema.

A mutation is rejected

Check the quote state, allowed status transition, storefront access configuration, and ownership. The resolver delegates the business operation to the base quote services, so a syntactically valid mutation can still fail a business rule.

Related

- Quote Lifecycle
- REST API Add-On
- Troubleshooting

Hyvä Theme Add-On

Install `MageB2B_B2BQuoteHyva` when the active storefront theme is based on Hyvä. It replaces the Luma-oriented quote presentation with Hyvä layouts, templates, view models, and frontend interactions while keeping the quote data and Magento Admin workflow in the base module.

Requirements

The compatibility package requires a compatible base B2B Quote installation, the supported Hyvä default theme, and an active Hyvä storefront on the store view being verified. Check the package dependency constraints during Composer resolution instead of copying package constraints into deployment notes.

Installing the compatibility package on a Luma store does not convert that store to Hyvä.

Install the package

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

php bin/magento module:enable MageB2B_B2BQuoteHyva
php bin/magento setup:upgrade
php bin/magento setup:di:compile
php bin/magento setup:static-content:deploy
php bin/magento cache:flush
```

See the installation guide for where to find the repository placeholders and access token (Account > Licenses).

Use the deployment commands appropriate for the current Magento mode and locale set. On a development environment, a full production-style compile and deployment may not be necessary.

Rebuild the Hyvä CSS

The package contains Tailwind source files and scans its own `templates/**/*.phtml` and `layout/**/*.xml`. Make sure the module is included by the Tailwind build used by the active child theme, then run that theme's normal Hyvä CSS build.

If the PHP templates render but controls look unstyled, do not stop at `cache:flush`: first confirm that the generated theme CSS contains the module's classes and that the rebuilt asset is the file delivered by the current store view.

Storefront areas covered

The compatibility module supplies Hyvä presentation for:

- quote list, create, view, edit, history, compare, messages, and split pages
- the mini quote drawer and quote header link
- product-page, category-page, and cart add-to-quote actions
- project and agreement pages
- related customer-account and order views

The precise action available to a buyer still depends on the base B2B Quote configuration, customer group, ownership, and current workflow state.

Verify one complete workflow

1. Sign in as an allowed B2B customer on the Hyvä store view.
2. Add a real catalog product to a quote from the product page.
3. Open the mini quote and confirm the item, quantity, and link to the quote editor.
4. Save and submit the quote.
5. Open the customer quote list and quote detail page.
6. Check a state-dependent action such as messaging, editing, accepting, or declining.
7. Repeat the product and quote pages at a mobile viewport.

Troubleshooting

Quote blocks are missing

Confirm that `Hyva_Theme`, `Hyva_CompatModuleFallback`, `MageB2B_B2BQuote`, and `MageB2B_B2BQuoteHyva` are enabled. Then inspect the layout handle of the affected page and make sure the compatibility layout is merged.

Two “Add to Quote” actions appear

The compatibility module disables the Luma catalog plugins that would otherwise duplicate the Hyvä action. A duplicate usually points to stale dependency-injection configuration or a third-party plugin that adds another button. Compile the merged DI configuration and identify both rendered blocks before hiding either one with CSS.

The page mixes Luma and Hyvä markup

Confirm the active theme for the affected store view, clear generated layout/cache state, and check whether another compatibility module overrides the same handle or template after B2B Quote.

Interactions do not respond

Check the browser console and network requests, verify that current static assets are deployed, and confirm that the quote action is permitted for the signed-in customer and current quote status.

Related guides

- Frontend Experience
- Mini Quote
- Quote Lifecycle

CSV Quote Import/Export Add-On

Use this add-on to move quote-domain records through Magento's standard CSV Import/Export screens or through entity-specific CLI import commands. It is intended for controlled migrations, repeatable setup, and bulk administration. It does not replace the customer-facing item CSV inside an individual quote.

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

Supported Entities

Import and export:

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

Export only:

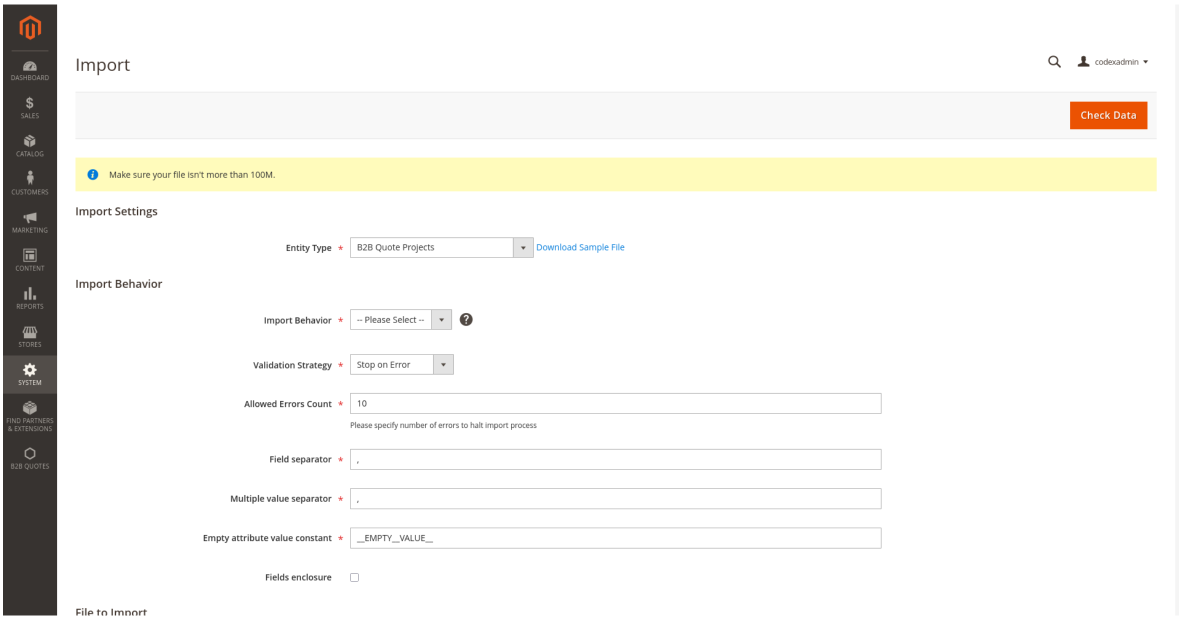
- Quote revisions
- Quote revision items

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)

Imports and exports respect Magento table prefixes, so installations with prefixed database tables can use the same entities and CLI commands.

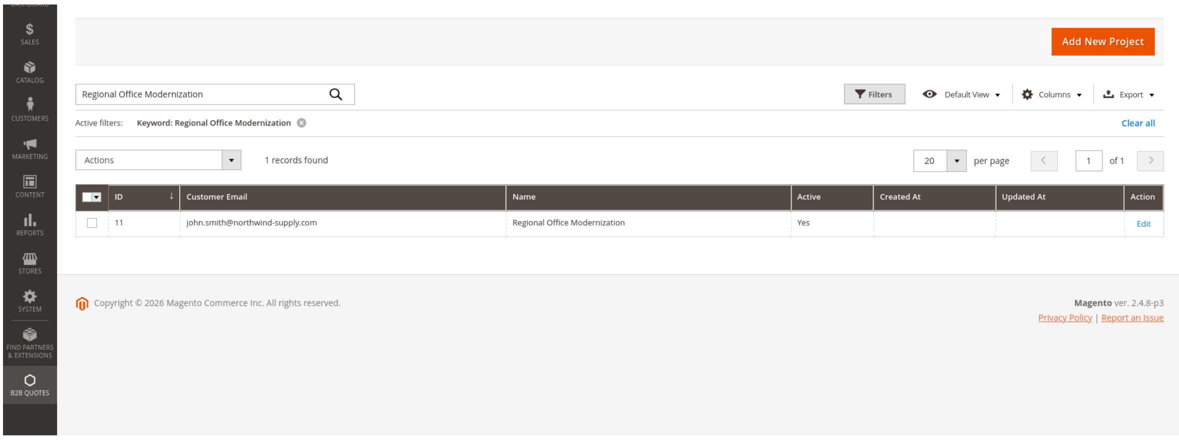


CLI Usage

The module provides one import command per importable entity. Every command requires a CSV path and an explicit `--behavior` value.

B2B Quote CLI Import

```
$ php bin/magento b2bquote:import-projects \
  /var/www/html/var/import/b2bquote_projects_demo.csv \
  --behavior=append --delete_file_after_import=0
Finished importing B2B quote projects from
/var/www/html/var/import/b2bquote_projects_demo.csv
```



Common command names:

```
php bin/magento b2bquote:import-quotes <file.csv> --
behavior=append
php bin/magento b2bquote:import-quote-items <file.csv> --
behavior=append
php bin/magento b2bquote:import-addresses <file.csv> --
```

```
behavior=append
php bin/magento b2bquote:import-messages <file.csv> --
behavior=append
php bin/magento b2bquote:import-projects <file.csv> --
behavior=append
php bin/magento b2bquote:import-statuses <file.csv> --
behavior=append
php bin/magento b2bquote:import-status-transitions <file.csv> --
behavior=append
php bin/magento b2bquote:import-categories <file.csv> --
behavior=append
php bin/magento b2bquote:import-tags <file.csv> --
behavior=append
php bin/magento b2bquote:import-fees <file.csv> --
behavior=append
```

Supported behaviors are `append`, `add_update`, `replace`, and `delete`. The command rejects a missing or unknown behavior before importing.

Common options:

Option	Purpose
`--behavior`	Required import behavior
`--field_separator`	CSV field delimiter; comma is the default
`--field_multiple_value_separator`	Separator for multi-value fields; comma is the default
`--fields_enclosure`	Enable the configured field-enclosure handling
`--delete_file_after_import`	`1` removes the source after a successful run; default is `1`

Preserve the source file during an initial migration test:

```
php bin/magento b2bquote:import-projects \
  var/import/b2bquote_projects.csv \
  --behavior=append \
  --delete_file_after_import=0
```

Run `php bin/magento list | grep b2bquote:import` on the target installation to confirm the commands available there.

Validation and portable identifiers

- Magento validates the complete CSV before import. When validation fails, the command prints the affected row and message and does not proceed.
- Use an export from the target installation as the starting structure whenever possible.
- Append imports for addresses and messages can resolve portable quote increment IDs. This is safer across installations than assuming internal quote entity IDs are identical.
- Guest quotes exported with access tokens can be imported without a Magento customer account when the target add-on supports the guest-token columns. Treat the token as a secret during the transfer and mask it in reviews.
- Spreadsheet programs can silently change identifiers, dates, decimal separators, or leading zeros. Review the saved CSV before import.
- Test `replace` and `delete` behaviors on a database copy first; they can remove or overwrite domain data.

Import order and dependency rules

For a portable migration, import the records in this order:

1. statuses and transitions;
2. projects, categories, and tags;
3. customer-owned quotes;
4. quote items and quote addresses;
5. messages, attachments, and fees;
6. revisions after the quote history is stable.

Use stable customer identifiers, quote increment IDs, SKUs, and status codes. Internal numeric IDs can change between installations. A quote item needs its parent quote and product reference. A message or attachment needs its quote, and a transition needs source and target statuses in the same store scope.

The portable columns commonly include:

Entity	Review these fields
Quote	customer or guest identity, increment ID, store, status, expiry, PO, notes, totals, and access token policy
Item	quote reference, product or SKU, quantity, catalogue price, offered price, counter price, options, and notes
Address	quote reference, billing/shipping type, name, street, city, region, postcode, country, and telephone
Message	quote reference, author, visibility, notification flag, text, and timestamp

Entity	Review these fields
Fee	quote reference, code, label, amount, tax flag, and store scope
Revision	quote reference, event, actor, snapshot, and parent revision

Do not import calculated totals as trusted values without recalculating the quote and comparing the result. Never include real passwords, private customer exports, or unmasked guest tokens in a CSV checked into source control.

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
B2BQ-OFFICE-001,10,299.99,"Delivery requested before the office refit"
```

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

- Frontend Experience

Troubleshooting

The command reports an unknown behavior

Pass one of the four supported values explicitly. `--behavior=append` is the usual starting point for a new controlled import.

Validation fails before any rows are imported

Read the reported row messages, compare the header with an exported or sample file for the same entity, and retry with a small subset. Also verify delimiters and file encoding.

The CSV disappears after a successful run

The CLI default is to delete the imported file. Use `--delete_file_after_import=0` while testing or when an external process owns archival of the source file.

OpenSign Add-On

The OpenSign add-on connects an approved B2B quote to a self-hosted OpenSign instance. When signatures are required, the buyer must sign the generated quote PDF before accepting the offer. Magento keeps the signature state and a copy of the completed PDF with the quote.

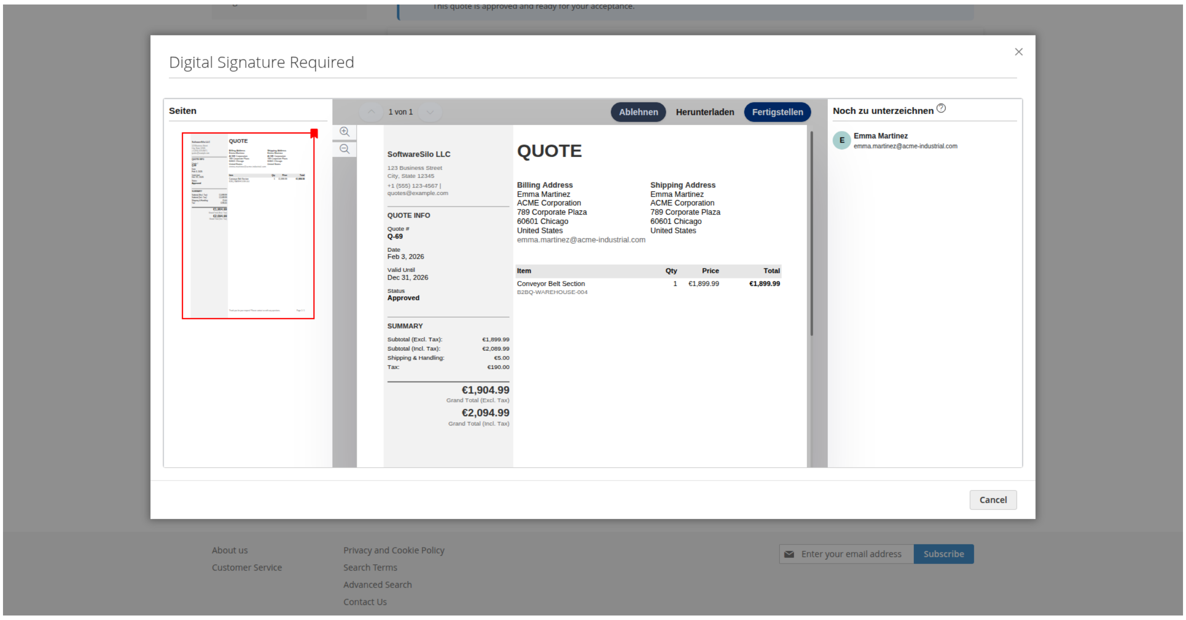
Package: `mageb2b/b2b-quote-opensign`

Magento module: `MageB2B_B2BQuoteOpenSign`

How the signing flow works

1. The customer opens an approved quote.
2. Magento generates its quote PDF and uploads it to OpenSign.
3. OpenSign creates a document, contact-book signer, and signature field.
4. The customer signs in the embedded signing screen.
5. Magento records the completed request, downloads the signed PDF, and moves the quote to the signed status.
6. The customer can continue with quote acceptance.

The add-on prevents signature creation and status updates for a quote that is not approved. It also checks quote ownership before exposing a customer's signing action.



Install the package

```
composer config bearer.repo.softwaresilo.io <token>
composer config repositories.softwaresilo composer
https://repo.softwaresilo.io/
```

```
composer require mageb2b/b2b-quote-opensign:*

php bin/magento module:enable MageB2B_B2BQuoteOpenSign
php bin/magento setup:upgrade
php bin/magento setup:di:compile
php bin/magento setup:static-content:deploy
php bin/magento cache:flush
```

See the installation guide for where to find the repository placeholders and access token (Account > Licenses).

Configure OpenSign

Open **Stores > Configuration > MageB2B > B2B Quote > OpenSign Digital Signatures**.

Connection and identity

Setting	Purpose
OpenSign API URL	Server-facing Parse API base URL used by Magento
OpenSign Public URL	Browser-facing base URL used for the signing interface and files
Application ID	OpenSign Parse application ID
Session Token	Preferred API credential when configured
Master Key	Fallback API credential when no session token is configured
System User ID	OpenSign `_User` object ID used as document creator
System Contracts User ID	Matching `contracts_Users` object ID
Webhook Secret	Shared secret required for completion callbacks

The session token, master key, and webhook secret are stored through Magento's encrypted configuration backend. Limit access to the configuration section and never paste these values into a support ticket or screenshot.

Separate internal and public URLs

Containerised installations often need two routes to the same OpenSign service:

- Magento uses an internal address, for example `http://opensign-proxy:3001/api/app`.
- The buyer's browser uses a public HTTPS address, for example

`https://sign.example.com`.

Do not put a container-only hostname into **OpenSign Public URL**. The signing modal and file links must be reachable from the buyer's browser. Conversely, confirm that the Magento runtime can resolve and reach the API URL before enabling the workflow.

Signature policy

Setting	Effect
Enable Digital Signatures	Enables the integration for the selected website scope
Require Signature for Acceptance	Blocks acceptance until a successful signature exists
Signature Request Expiry (Days)	Sets the lifetime of a newly created signature request; default is seven days

Save the configuration and use **Test Connection**. A successful connection check does not replace a real signing test because PDF upload, browser routing, certificate use, and callback handling occur later in the flow.

Configure the OpenSign service

OpenSign needs a valid P12/PFX certificate and its matching passphrase to finalise signed PDFs. Configure the OpenSign server's `PFX_BASE64` and `PASS_PHRASE` according to the OpenSign deployment documentation. Keep its public/server URL settings aligned with the Magento public and API URLs.

For the buyer workflow, OpenSign must allow the unauthenticated recipient route generated by the add-on. Do not replace it with a route that requires the customer to have an OpenSign account or session.

Verify the complete workflow

Use a non-production approved quote belonging to a fictional demo customer:

1. Open the quote as that customer and start the signature.
2. Confirm that the signing screen displays the correct quote document and signer.
3. Complete a typed signature, then repeat with drawn and uploaded signatures if those modes are allowed by the OpenSign setup.
4. Confirm that OpenSign reports success.
5. Reload the Magento quote and confirm its signed state.
6. Confirm that the signed PDF is available to the customer and an authorised administrator.
7. Accept the signed quote and verify the normal conversion workflow.

The administrator quote view shows the signer, request status, signed date, document identifier, and signed-PDF download when available.

Webhook security

Configure the same high-entropy secret in Magento and the OpenSign callback. The module accepts the shared secret in the `X-OpenSign-Webhook-Secret` header or supported callback payload. Expose the callback over HTTPS and do not disable its verification to work around a routing problem.

The completion process preserves terminal signed requests and ignores unsuccessful remote responses. Magento stores the signed PDF locally so it does not depend on a short-lived OpenSign file token later.

Troubleshooting

The connection test fails

Check DNS and network reachability from the Magento runtime, not only from the host browser. Confirm the API URL, application ID, system IDs, and active session token or master key.

The signing screen does not load

Open the browser console and network panel. The usual causes are an internal hostname in the public URL, HTTPS/mixed-content restrictions, frame/CSP restrictions, or a signing URL that requires an OpenSign login.

OpenSign says the PDF is incompatible

If typed signatures work but drawn or uploaded signatures fail, check the OpenSign deployment and the signature-field dimensions expected by that deployment. The add-on sends both the lowercase and uppercase width/height values required by the verified OpenSign flow.

Finalisation reports an ASN.1 or PFX error

The OpenSign certificate data is missing, truncated, incorrectly encoded, or paired with the wrong passphrase. Regenerate and validate the P12/PFX value in the OpenSign environment; changing Magento quote data will not resolve this error.

The quote remains unsigned after OpenSign succeeds

Check the callback request, shared webhook secret, Magento logs, local signature-request status, and whether the quote was still approved. Do not manually change the quote status before confirming whether the signed PDF was downloaded and stored.

Related guides

- Quote Lifecycle
- PDF Export & Layouts
- Cart and Order Conversion

PDF Designer Add-On

The base B2B Quote module already generates PDFs. Install PDF Designer when the standard layouts cannot meet a company's document design: branded page structure, positioned text and images, tables, QR codes, barcodes, custom fonts, or store-specific layouts.

Package: `mageb2b/b2b-quote-pdfdesigner`

Magento module: `MageB2B_B2BQuotePdfDesigner`

Install the package

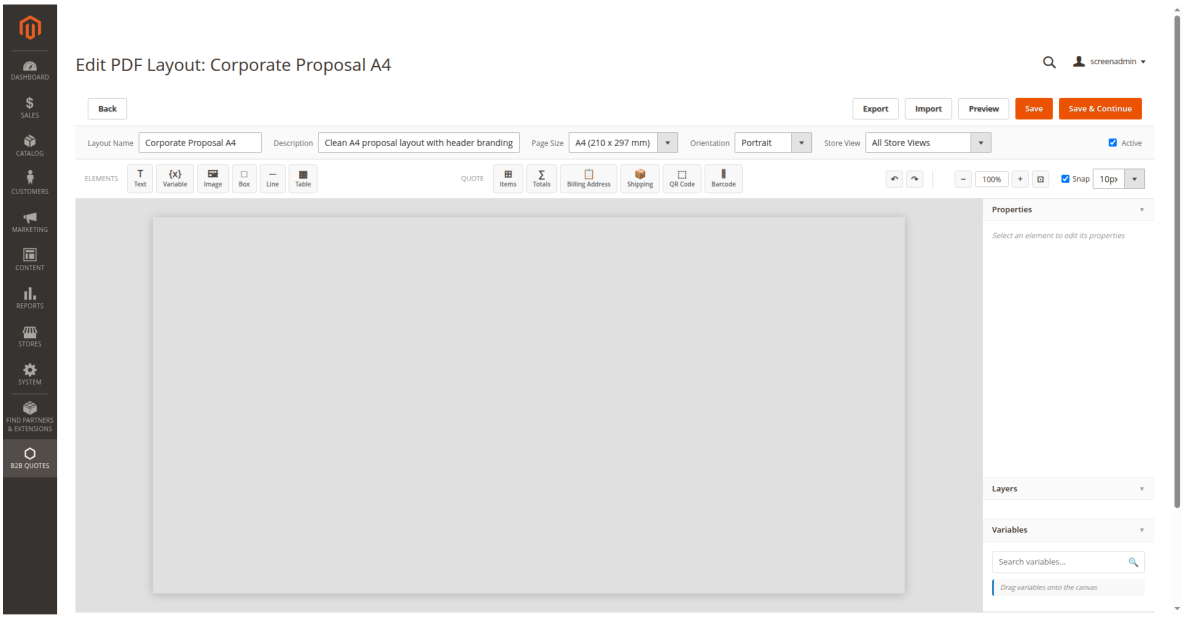
```
composer config bearer.repo.softwaresilo.io <token>
composer config repositories.softwaresilo composer
https://repo.softwaresilo.io/
composer require mageb2b/b2b-quote-pdfdesigner:*

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
```

See the installation guide for where to find the repository placeholders and access token (Account > Licenses).

Create a layout

Open **B2B Quotes > PDF Layout Designer** and create a layout.

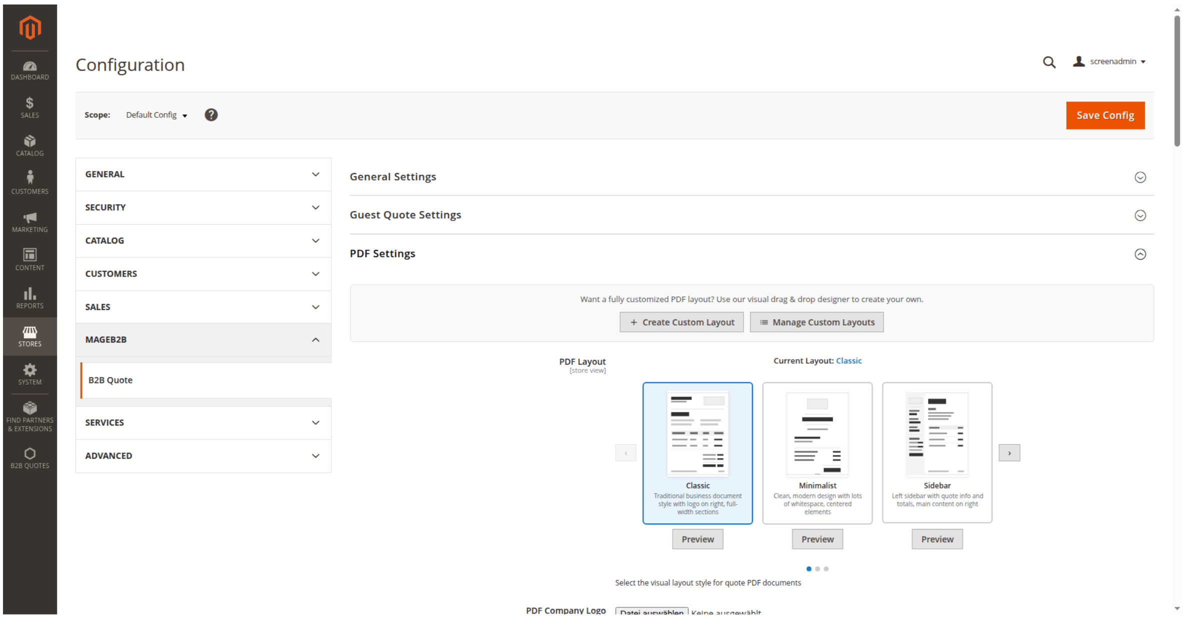
1. Give it a stable code and a recognisable name.
2. Select the store views that may use it.
3. Set page size, orientation, background, and page zones.
4. Add the required text, image, table, line, QR-code, or barcode elements.
5. Insert dynamic quote variables through the variable browser.
6. Preview the PDF before saving and again after saving.
7. Generate a PDF from a real demo quote to check long names, multiple items, tax, shipping, and page breaks.



The preview uses representative data and is useful while positioning elements. It does not cover every length or product combination that occurs in a real quote, so the final quote-PDF check is essential.

Select the layout for quote PDFs

Open **Stores > Configuration > MageB2B > B2B Quote > PDF Settings** and select the layout under **PDF Layout** for the intended configuration scope.



A custom layout is offered only where its store assignment permits it. If it is visible in the designer but absent from configuration or PDF generation, compare the layout's store views with the quote's store.

Use variables safely

Variables use double braces:

```
Quote {{increment_id}}
Prepared for {{customer_name}}
Valid until {{expires_at|date:Y-m-d}}
Total {{grand_total|currency}}
```

Available formatters are:

Formatter	Example	Result
`currency`	`{{grand_total	currency}}`
`number:N`	`{{discount	number:2}}`
`date:FORMAT`	`{{created_at	date:Y-m-d}}`
`uppercase` / `lowercase`	`{{project_name	uppercase}}`
`truncate:N`	`{{customer_note	truncate:80}}`
`percent`	`{{discount_percent	percent}}`

Choose variables from the designer instead of guessing codes. An unknown variable resolves to an empty value, which can leave an apparently unexplained gap in the PDF.

Fonts and backgrounds

The designer lists standard PDF fonts and custom font files found below Magento media directory `b2bquote/fonts`. Use fonts that contain every character required by the store's customer names, addresses, and language. Test umlauts and other non-ASCII text explicitly.

Font fallback is disabled by default. If fallback is enabled in configuration, choose a dependable family and verify that the rendered weight and style exist. A browser preview can look correct even when the PDF renderer cannot load the same font file.

For background images, keep file size and contrast suitable for every generated page. Confirm that customer text remains readable and that the image URL/file is available to the Magento PDF process.

Permissions

Administrator roles can receive separate permissions to:

- view layouts
- create or edit layouts
- delete layouts

Give delete permission only to roles responsible for document templates. Deleting a layout that is still selected in configuration can interrupt quote PDF generation until another valid layout is chosen.

Import and export layout definitions

The editor can export its layout definition and import a compatible definition. Treat exported JSON as configuration code: review it before importing, keep it in source control or another controlled store, and preview the imported result before assigning it to a live store view.

Troubleshooting

The editor is blank or controls do not respond

Check the browser console and loaded JavaScript assets. The editor depends on its designer scripts and bundled canvas, QR-code, and barcode libraries. Redeploy static content for the affected admin locale and invalidate stale assets after an upgrade.

Preview works but a quote PDF fails

Generate the PDF with the same quote and store view, then inspect Magento logs for an invalid layout element, inaccessible image, missing font, or variable value with an unexpected type. Also confirm that the saved layout—not only unsaved canvas state—contains the latest changes.

Text is cut off or overlaps

Test realistic long company names, multi-line addresses, notes, and enough products to span pages. Increase the element area or use tables/zones designed for flowing content rather than shrinking all text.

A layout is missing from the selector

Confirm that it is active, valid, and assigned to the current store. Then save the layout, clear the relevant configuration cache, and reload the scoped PDF setting.

Developer extension point

A Magento module can implement `MageB2B\B2BQuotePdfDesigner\Api\VariableProviderInterface` and register the provider in the PDF Designer provider pool. A provider declares its category and variables and resolves each supported code from the supplied quote/store rendering context. Keep custom resolvers deterministic and avoid remote calls during PDF generation.

Related guides

- PDF Export & Layouts
- Quote Management
- Admin Permissions

Sample Data Add-On

The Sample Data add-on installs demo data for B2B Quote so implementation teams can test workflows without creating every quote, project, rule, and attachment manually.

This add-on is:

- Composer package: `mageb2b/b2b-quote-sample-data`
- Magento module: `MageB2B_B2BQuoteSampleData`
- Requires the base module: `MageB2B_B2BQuote`

What It Installs

The add-on builds a connected example workflow rather than a set of unrelated records. Its CSV fixtures create:

- customers, customer addresses, and products
- quote statuses and allowed status transitions
- categories, tags, pricing rules, and workflow rules
- customer projects and quotes with line items
- agreements and agreement call-off items
- quote fees, messages, attachments, and addresses
- category and tag assignments
- revision history

This makes the data useful for demonstrations, acceptance testing, and administrator training. It is not intended for a production catalog.

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-sample-data:*
```

See the installation guide for where to find the repository placeholders and access token (Account > Licenses).

2) Enable module + run setup

```
php bin/magento module:enable MageB2B_B2BQuoteSampleData
php bin/magento setup:upgrade
php bin/magento cache:flush
```

The data patch runs during `setup:upgrade`. It installs dependencies first, followed by quote configuration, rules, projects, quotes, related records, and revision history. Individual fixture errors are printed during installation, so review the command output instead of assuming every record was created.

CLI Commands

Verify the core sample set:

```
php bin/magento sampledata:verify:b2b-quote
```

The verifier checks customers, products, projects, quotes, quote items, categories, tags, pricing rules, and workflow rules. It does not currently validate every agreement, fee, message, attachment, address, or revision record.

Reset the sample set:

```
php bin/magento sampledata:reset:b2b-quote
```

The reset command asks for confirmation and deletes records identified by the module's fixtures. It also removes the sample-data patch entry so that a later `setup:upgrade` can install the fixtures again.

Use reset only in a local, demo, or staging environment. Take a database backup first if people have worked with or modified the installed examples. To reinstall after reset:

```
php bin/magento setup:upgrade
php bin/magento sampledata:verify:b2b-quote
```

No Admin UI

This add-on does not add a separate admin page. It is fixture and CLI driven.

Use the normal B2B Quote admin pages to inspect the created records:

- Quote Management
- Projects
- Status Configuration
- Pricing Rules
- Workflow Rules

Troubleshooting

If sample data is incomplete:

1. Run `sampledata:verify:b2b-quote`.
2. Review the previous `setup:upgrade` output for fixture warnings.
3. Check whether the fixture customers and products exist; quotes depend on them.
4. Check `var/log/system.log` and `var/log/exception.log`.
5. Reset and rerun `setup:upgrade` only if the environment can safely lose the sample records.

Related

- Installation Guide
- Configuration
- Troubleshooting

Configuration Fields

This reference lists the Magento Admin settings exposed by the base package and its documented add-ons: `mageb2b/b2b-quote`, `mageb2b/b2b-quote-opensign`.

Configuration paths are included for controlled deployments and `config:set`. Use Magento Admin for normal changes so field validation and scope inheritance still apply. The extension status display is not listed because it reports installation state rather than a configurable value.

`mageb2b/b2b-quote`

General Settings

Field	Configuration path	Input	Scope
Enable B2B Quote	`b2bquote/general/enable`	Select	Default, Website, Store view
Quote Number Format	`b2bquote/general/quote_number_format`	Text	Default, Website, Store view
Default Quote Status	`b2bquote/general/default_status`	Select	Default, Website, Store view
Default Expiration Days	`b2bquote/general/default_expiration_days`	Text	Default, Website, Store view
Accept Mode	`b2bquote/general/accept_mode`	Select	Default, Website, Store view
Allow Customer to Choose Accept Mode	`b2bquote/general/allow_quote_accept_mode_choice`	Select	Default, Website, Store view
Maximum Quotes Per Customer	`b2bquote/general/max_quotes_per_customer`	Text	Default, Website, Store view
Maximum Quote Items	`b2bquote/general/max_quote_items`	Text	Default, Website, Store view
Maximum Item Quantity	`b2bquote/general/max_item_qty`	Text	Default, Website, Store view

Field	Configuration path	Input	Scope
Allowed Customer Groups	`b2bquote/general/allowed_customer_groups`	Multi-select	Default, Website, Store view
Enable Auto-Approval	`b2bquote/general/auto_approval_enabled`	Select	Default, Website, Store view
Auto-Approval Threshold	`b2bquote/general/auto_approval_threshold`	Text	Default, Website, Store view
Clear Cart After Conversion	`b2bquote/general/clear_cart_after_conversion`	Select	Default, Website, Store view
Clear Cart Before Accepting Quote to Cart	`b2bquote/general/clear_cart_before_accept_add_to_cart`	Select	Default, Website, Store view

Visibility dependencies:

- `b2bquote/general/default_status` is available when `b2bquote/general/enable` is `1`.
- `b2bquote/general/default_expiration_days` is available when `b2bquote/general/enable` is `1`.
- `b2bquote/general/accept_mode` is available when `b2bquote/general/enable` is `1`.
- `b2bquote/general/accept_mode` is available when `b2bquote/general/allow_quote_accept_mode_choice` is `0`.
- `b2bquote/general/allow_quote_accept_mode_choice` is available when `b2bquote/general/enable` is `1`.
- `b2bquote/general/max_quotes_per_customer` is available when `b2bquote/general/enable` is `1`.
- `b2bquote/general/max_quote_items` is available when `b2bquote/general/enable` is `1`.
- `b2bquote/general/max_item_qty` is available when `b2bquote/general/enable` is `1`.
- `b2bquote/general/allowed_customer_groups` is available when `b2bquote/general/enable` is `1`.
- `b2bquote/general/auto_approval_enabled` is available when `b2bquote/general/enable` is `1`.
- `b2bquote/general/auto_approval_threshold` is available when `b2bquote/general/enable` is `1`.
- `b2bquote/general/auto_approval_threshold` is available when `b2bquote/general/auto_approval_enabled` is `1`.

- `b2bquote/general/clear_cart_after_conversion` is available when `b2bquote/general/enable` is `1`.
- `b2bquote/general/clear_cart_before_accept_add_to_cart` is available when `b2bquote/general/enable` is `1`.
- `b2bquote/general/clear_cart_before_accept_add_to_cart` is available when `b2bquote/general/accept_mode` is `add_to_cart`.

Admin Responsibility

Field	Configuration path	Input	Scope
Admin User Quote	`b2bquote/admin_assignment/mode`	Select	Default, Website, Store view
Enable Admin Inbox Notifications	`b2bquote/admin_assignment/admin_inbox_enabled`	Select	Default, Website, Store view

Guest Quote Settings

Field	Configuration path	Input	Scope
Enable Guest Quotes	`b2bquote/guest_quote/enabled`	Select	Default, Website, Store view
Quote Number Format	`b2bquote/guest_quote/quote_number_format`	Text	Default, Website, Store view
Access Token Pattern	`b2bquote/guest_quote/access_token_pattern`	Text	Default, Website, Store view

Visibility dependencies:

- `b2bquote/guest_quote/enabled` is available when `b2bquote/general/enable` is `1`.
- `b2bquote/guest_quote/quote_number_format` is available when `b2bquote/guest_quote/enabled` is `1`.
- `b2bquote/guest_quote/access_token_pattern` is available when `b2bquote/guest_quote/enabled` is `1`.

PDF Settings

Field	Configuration path	Input	Scope
PDF Layout	`b2bquote/pdf/pdf_layout`	Custom control	Default, Website, Store view
PDF Company Logo	`b2bquote/pdf/pdf_logo_path`	Image	Default, Website, Store view
PDF Company Name	`b2bquote/pdf/pdf_company_name`	Text	Default, Website, Store view
PDF Company Address	`b2bquote/pdf/pdf_company_address`	Text area	Default, Website, Store view
PDF Company Phone	`b2bquote/pdf/pdf_company_phone`	Text	Default, Website, Store view
PDF Company Email	`b2bquote/pdf/pdf_company_email`	Text	Default, Website, Store view
PDF Footer Text	`b2bquote/pdf/pdf_footer_text`	Text area	Default, Website, Store view
PDF Download Restricted Statuses	`b2bquote/pdf/pdf_download_restricted_statuses`	Multi-select	Default, Website, Store view
Display Quote Item Notes	`b2bquote/pdf/pdf_display_item_notes`	Select	Default, Website, Store view

Frontend Settings

Field	Configuration path	Input	Scope
Add to Quote Button Text	`b2bquote/frontend_settings/button_text`	Text	Default, Website, Store view

Field	Configuration path	Input	Scope
Display on Product Page	`b2bquote/frontend_settings/display_on_product`	Select	Default, Website, Store view
Display on Category Page	`b2bquote/frontend_settings/display_on_category`	Select	Default, Website, Store view
Show in Top Navigation	`b2bquote/frontend_settings/show_in_topnav`	Select	Default, Website, Store view
Enable Mini Quote	`b2bquote/frontend_settings/enable_mini_quote`	Select	Default, Website, Store view
Mini Quote Max Quotes	`b2bquote/frontend_settings/mini_quote_max_display`	Text	Default, Website, Store view
Mini Quote Display Mode	`b2bquote/frontend_settings/mini_quote_display_mode`	Select	Default, Website, Store view
Allow Counter Offer	`b2bquote/frontend_settings/allow_counter_offer`	Select	Default, Website, Store view
Show Prices in Frontend	`b2bquote/frontend_settings/show_prices`	Select	Default, Website, Store view
Quote List Page Size	`b2bquote/frontend_settings/quote_list_page_size`	Text	Default, Website, Store view
Redirect to Quote After Product Add	`b2bquote/frontend_settings/redirect_after_product_add`	Select	Default, Website, Store view
Enable Cart to Quote Conversion	`b2bquote/frontend_settings/enable_cart_conversion`	Select	Default, Website, Store view
Cart Conversion Minimum Amount	`b2bquote/frontend_settings/cart_conversion_min_amount`	Text	Default, Website, Store view
Cart Conversion Button Text	`b2bquote/frontend_settings/cart_conversion_button_text`	Text	Default, Website, Store view

Field	Configuration path	Input	Scope
Show History Tab	`b2bquote/frontend_settings/show_history_tab`	Select	Default, Website, Store view
Allow Duplicate Quote	`b2bquote/frontend_settings/allow_duplicate_quote`	Select	Default, Website, Store view
Duplicate Quote: Copy Fields	`b2bquote/frontend_settings/duplicate_copy_fields`	Multi-select	Default, Website, Store view

Visibility dependencies:

- `b2bquote/frontend_settings/mini_quote_max_display` is available when `b2bquote/frontend_settings/enable_mini_quote` is `1`.
- `b2bquote/frontend_settings/mini_quote_display_mode` is available when `b2bquote/frontend_settings/enable_mini_quote` is `1`.
- `b2bquote/frontend_settings/cart_conversion_min_amount` is available when `b2bquote/frontend_settings/enable_cart_conversion` is `1`.
- `b2bquote/frontend_settings/cart_conversion_button_text` is available when `b2bquote/frontend_settings/enable_cart_conversion` is `1`.
- `b2bquote/frontend_settings/duplicate_copy_fields` is available when `b2bquote/frontend_settings/allow_duplicate_quote` is `1`.

Email Notifications

Field	Configuration path	Input	Scope
Enable Email Notifications	`b2bquote/email_notifications/enabled`	Select	Default, Website, Store view
Email Sender	`b2bquote/email_notifications/email_sender`	Select	Default, Website, Store view
Admin Recipients	`b2bquote/email_notifications/admin_recipients`	Text	Default, Website, Store view
Quote Submitted Template	`b2bquote/email_notifications/template_quote_submitted`	Select	Default, Website, Store view
Counter Offer Template	`b2bquote/email_notifications/template_counter_offer`	Select	Default, Website, Store view
Status Changed Template	`b2bquote/email_notifications/template_status_changed`	Select	Default, Website, Store view

Field	Configuration path	Input	Scope
Quote Expired Template	`b2bquote/email_notifications/template_quote_expired`	Select	Default, Website, Store view
Price Negotiated Template	`b2bquote/email_notifications/template_price_negotiated`	Select	Default, Website, Store view
Message Notification Template	`b2bquote/email_notifications/template_message_notification`	Select	Default, Website, Store view
Message Notification Template (Admin → Customer)	`b2bquote/email_notifications/template_message_notification_admin`	Select	Default, Website, Store view
Send Email Copy Method	`b2bquote/email_notifications/email_copy_method`	Select	Default, Website, Store view
Expiration Reminder Intervals	`b2bquote/email_notifications/expiration_reminder_intervals`	Custom control	Default, Website, Store view
Enable Expiration Reminder Emails	`b2bquote/email_notifications/expiration_reminder_enabled`	Select	Default, Website, Store view
Expiration Reminder Template	`b2bquote/email_notifications/template_expiration_reminder`	Select	Default, Website, Store view
Attach Quote PDF	`b2bquote/email_notifications/attach_quote_pdf`	Select	Default, Website, Store view
Attach Customer Files	`b2bquote/email_notifications/attach_customer_files`	Select	Default, Website, Store view

Visibility dependencies:

- `b2bquote/email_notifications/email_sender` is available when `b2bquote/email_notifications/enabled` is `1`.
- `b2bquote/email_notifications/admin_recipients` is available when `b2bquote/email_notifications/enabled` is `1`.
- `b2bquote/email_notifications/template_quote_submitted` is available when `b2bquote/email_notifications/enabled` is `1`.
- `b2bquote/email_notifications/template_counter_offer` is available when `b2bquote/email_notifications/enabled` is `1`.
- `b2bquote/email_notifications/template_status_changed` is available when `b2bquote/email_notifications/enabled` is `1`.
- `b2bquote/email_notifications/template_quote_expired` is available when

b2bquote/email_notifications/enabled is 1.

- b2bquote/email_notifications/template_price_negotiated is available when b2bquote/email_notifications/enabled is 1.
- b2bquote/email_notifications/template_message_notification is available when b2bquote/email_notifications/enabled is 1.
- b2bquote/email_notifications/template_message_notification_admin is available when b2bquote/email_notifications/enabled is 1.
- b2bquote/email_notifications/email_copy_method is available when b2bquote/email_notifications/enabled is 1.
- b2bquote/email_notifications/expiration_reminder_intervals is available when b2bquote/email_notifications/enabled is 1.
- b2bquote/email_notifications/expiration_reminder_enabled is available when b2bquote/email_notifications/enabled is 1.
- b2bquote/email_notifications/template_expiration_reminder is available when b2bquote/email_notifications/enabled is 1.
- b2bquote/email_notifications/attach_quote_pdf is available when b2bquote/email_notifications/enabled is 1.
- b2bquote/email_notifications/attach_customer_files is available when b2bquote/email_notifications/enabled is 1.

Pricing Settings

Field	Configuration path	Input	Scope
Enable Price Negotiation	b2bquote/pricing/negotiation_enabled	Select	Default, Website, Store view

Quote Fees

Field	Configuration path	Input	Scope
Apply Tax to Quote Fee	b2bquote/quote_fee/apply_tax	Select	Default, Website, Store view
Fee Amount Includes Tax	b2bquote/quote_fee/fee_includes_tax	Select	Default, Website, Store view
Tax Class	b2bquote/quote_fee/tax_class_id	Select	Default, Website, Store view

Visibility dependencies:

- `b2bquote/quote_fee/fee_includes_tax` is available when `b2bquote/quote_fee/apply_tax` is `1`.
- `b2bquote/quote_fee/tax_class_id` is available when `b2bquote/quote_fee/apply_tax` is `1`.

Shipping Settings

Field	Configuration path	Input	Scope
Shipping Required	`b2bquote/shipping/required`	Select	Default, Website, Store view
Free Shipping Threshold	`b2bquote/shipping/free_shipping_threshold`	Text	Default, Website, Store view
Disallowed Shipping Methods	`b2bquote/shipping/disallowed_methods`	Multi-select	Default, Website, Store view

Payment Settings

Field	Configuration path	Input	Scope
Payment Required	`b2bquote/payment/required`	Select	Default, Website, Store view
Disallowed Payment Methods	`b2bquote/payment/disallowed_methods`	Multi-select	Default, Website, Store view

Attachments

Field	Configuration path	Input	Scope
Allowed File Extensions	`b2bquote/attachments/allowed_extensions`	Text	Default, Website, Store view
Max File Size (MB)	`b2bquote/attachments/max_filesize_mb`	Text	Default, Website, Store view
Max Attachments (Frontend)	`b2bquote/attachments/max_attachments_frontend`	Text	Default, Website, Store view

Field	Configuration path	Input	Scope
Disable Attachments for Statuses	`b2bquote/attachments/disabled_statuses`	Multi-select	Default, Website, Store view
Temporary File Retention (Hours)	`b2bquote/attachments/temporary_file_retention_hours`	Text	Default

Messaging

Field	Configuration path	Input	Scope
Maximum Message Length	`b2bquote/messaging/max_message_length`	Text	Default, Website, Store view
Disable Messaging for Statuses	`b2bquote/messaging/messaging_disabled_statuses`	Multi-select	Default, Website, Store view

Inventory Reservation

Field	Configuration path	Input	Scope
Reserve Inventory on Approval	`b2bquote/inventory/reserve_on_approval`	Select	Default, Website, Store view
Reservation Compensation Code	`b2bquote/inventory/reservation_compensation_code`	Text	Default, Website, Store view
Release Inventory on Expiration	`b2bquote/inventory/release_on_expiration`	Select	Default, Website, Store view
Release Inventory on Rejection	`b2bquote/inventory/release_on_rejection`	Select	Default, Website, Store view

Visibility dependencies:

- `b2bquote/inventory/reservation_compensation_code` is available when `b2bquote/inventory/reserve_on_approval` is `1`.
- `b2bquote/inventory/release_on_expiration` is available when `b2bquote/inventory/reserve_on_approval` is `1`.
- `b2bquote/inventory/release_on_rejection` is available when `b2bquote/inventory/reserve_on_approval` is `1`.

Pricing Rules

Field	Configuration path	Input	Scope
Enable Pricing Rules	`b2bquote/pricing_rules/pricing_rules_enabled`	Select	Default, Website, Store view
Allow Rule Stacking	`b2bquote/pricing_rules/can_stack_rules`	Select	Default, Website, Store view

Visibility dependencies:

- `b2bquote/pricing_rules/can_stack_rules` is available when `b2bquote/pricing_rules/pricing_rules_enabled` is `1`.

Quote Merge & Split

Field	Configuration path	Input	Scope
Enable Quote Merge (Frontend)	`b2bquote/quote_merge_split/merge_enabled`	Select	Default, Website, Store view
Merge Messages Default	`b2bquote/quote_merge_split/merge_messages_default`	Select	Default, Website, Store view
Merge Attachments Default	`b2bquote/quote_merge_split/merge_attachments_default`	Select	Default, Website, Store view
Enable Quote Split (Frontend)	`b2bquote/quote_merge_split/split_enabled`	Select	Default, Website, Store view
Delete Source Quotes After Merge	`b2bquote/quote_merge_split/delete_source_after_merge`	Select	Default, Website, Store view

Visibility dependencies:

- `b2bquote/quote_merge_split/merge_enabled` is available when `b2bquote/general/enable` is `1`.
- `b2bquote/quote_merge_split/merge_messages_default` is available when `b2bquote/quote_merge_split/merge_enabled` is `1`.
- `b2bquote/quote_merge_split/merge_attachments_default` is available when `b2bquote/quote_merge_split/merge_enabled` is `1`.

- `b2bquote/quote_merge_split/split_enabled` is available when `b2bquote/general/enable` is `1`.
- `b2bquote/quote_merge_split/delete_source_after_merge` is available when `b2bquote/quote_merge_split/merge_enabled` is `1`.

Workflow

Field	Configuration path	Input	Scope
Enable Workflow	`b2bquote/workflow/workflow_enabled`	Select	Default, Website, Store view
Workflow Rules Validate Transitions	`b2bquote/workflow/transition_validation`	Select	Default, Website, Store view

Visibility dependencies:

- `b2bquote/workflow/transition_validation` is available when `b2bquote/workflow/workflow_enabled` is `1`.

Revision Tracking

Field	Configuration path	Input	Scope
Enabled Revision Events	`b2bquote/revision/enabled_events`	Multi-select	Default, Website, Store view
Enable Revision Cleanup	`b2bquote/revision/cleanup_enabled`	Select	Default, Website, Store view
Revision Retention Days	`b2bquote/revision/cleanup_days`	Text	Default, Website, Store view

Visibility dependencies:

- `b2bquote/revision/cleanup_days` is available when `b2bquote/revision/cleanup_enabled` is `1`.

Customer Experience Settings

Field	Configuration path	Input	Scope
Use Customer Address Book	`b2bquote/customer_experience/use_customer_addressbook`	Select	Default, Website, Store view
Allow Empty Draft Quote	`b2bquote/customer_experience/allow_empty_draft_quote`	Select	Default, Website, Store view
Draft Quote Lifetime (Days)	`b2bquote/customer_experience/draft_lifetime_days`	Text	Default, Website, Store view
Draft Deletion Notice (Days Before)	`b2bquote/customer_experience/draft_notice_days_before`	Text	Default, Website, Store view
Typical Response Time (Business Days)	`b2bquote/customer_experience/typical_response_time_days`	Text	Default, Website, Store view
Important Information (WYSIWYG)	`b2bquote/customer_experience/important_information`	Custom control	Default, Website, Store view
Approval Validity Period (Days)	`b2bquote/customer_experience/approval_validity_days`	Text	Default, Website, Store view

Order Creation Settings

Field	Configuration path	Input	Scope
Price Change Behavior	`b2bquote/order_creation/price_change_behavior`	Select	Default, Website, Store view
Stock Validation Behavior	`b2bquote/order_creation/stock_validation_behavior`	Select	Default, Website, Store view
Check Product Availability	`b2bquote/order_creation/product_availability_check`	Select	Default, Website, Store view

`mageb2b/b2b-quote-opensign`

OpenSign Digital Signatures

Field	Configuration path	Input	Scope
Enable Digital Signatures	`b2bquote/opensign/enabled`	Select	Default, Website
OpenSign API URL	`b2bquote/opensign/api_url`	Text	Default
Application ID	`b2bquote/opensign/app_id`	Text	Default
Master Key	`b2bquote/opensign/master_key`	Protected text	Default
Session Token	`b2bquote/opensign/session_token`	Protected text	Default
System User ID	`b2bquote/opensign/system_user_id`	Text	Default
System Contracts User ID	`b2bquote/opensign/system_contracts_user_id`	Text	Default
Webhook Secret	`b2bquote/opensign/webhook_secret`	Protected text	Default
Require Signature for Acceptance	`b2bquote/opensign/require_signature`	Select	Default, Website
Signature Request Expiry (Days)	`b2bquote/opensign/expiry_days`	Text	Default, Website
OpenSign Public URL	`b2bquote/opensign/public_url`	Text	Default
Test Connection	`b2bquote/opensign/test_connection`	Custom control	Default

Visibility dependencies:

- `b2bquote/opensign/api_url` is available when `b2bquote/opensign/enabled` is `1`.
- `b2bquote/opensign/app_id` is available when `b2bquote/opensign/enabled` is `1`.
- `b2bquote/opensign/master_key` is available when `b2bquote/opensign/enabled` is `1`.
- `b2bquote/opensign/session_token` is available when `b2bquote/opensign/enabled` is `1`.
- `b2bquote/opensign/system_user_id` is available when

`b2bquote/opensign/enabled` is `1`.

- `b2bquote/opensign/system_contracts_user_id` is available when `b2bquote/opensign/enabled` is `1`.
- `b2bquote/opensign/webhook_secret` is available when `b2bquote/opensign/enabled` is `1`.
- `b2bquote/opensign/require_signature` is available when `b2bquote/opensign/enabled` is `1`.
- `b2bquote/opensign/expiry_days` is available when `b2bquote/opensign/enabled` is `1`.
- `b2bquote/opensign/public_url` is available when `b2bquote/opensign/enabled` is `1`.
- `b2bquote/opensign/test_connection` is available when `b2bquote/opensign/enabled` is `1`.

Database Reference

B2B Quote keeps commercial discussions, revisions and agreements connected to standard Magento customers, products and orders. The tables below cover the relationships that matter for integrations and data ownership without reproducing the complete schema.

Quote and sales context

Relationship	Why it matters
`b2b_quote` optionally belongs to one `customer_entity`	Associates a quote with the customer who requested or receives it.
`b2b_quote` belongs to one `store`	Preserves the Store View and commercial context in which the quote was created.
`b2b_quote` can create one `sales_order`	Links an accepted quote to the resulting Magento order.
`b2b_quote` belongs to one `b2b_quote_status`	Places the quote in the configured business workflow.
`b2b_quote_item` belongs to one `b2b_quote`	Stores the commercial lines negotiated in the quote.
`b2b_quote_item` optionally refers to one `catalog_product_entity`	Keeps a quote line connected to its Magento product when that product still exists.
`b2b_quote_address` belongs to one `b2b_quote`	Stores the billing or shipping snapshot used for the quote.

Communication and revision history

Relationship	Why it matters
`b2b_quote_message` belongs to one `b2b_quote`	Keeps customer and administrator communication with the commercial record.
`b2b_quote_message` can identify one `customer_entity` or `admin_user`	Records which side of the negotiation sent a message.
`b2b_quote_attachment` belongs to one `b2b_quote` and optionally one `b2b_quote_message`	Keeps files attached to the correct discussion.

Relationship	Why it matters
`b2b_quote_revision` belongs to one `b2b_quote`	Preserves the negotiation history instead of overwriting earlier terms.
`b2b_quote_revision` can follow one earlier `b2b_quote_revision`	Maintains the revision sequence.
`b2b_quote_revision_item` belongs to one `b2b_quote_revision`	Captures the line state for a specific revision.

Agreements and workflow

Relationship	Why it matters
`b2b_quote_project` belongs to one `customer_entity`	Groups related quotes and agreements for the same customer project.
`b2b_quote_agreement` belongs to one `customer_entity` and optionally one `b2b_quote_project`	Stores the negotiated agreement used for later call-offs.
`b2b_quote_agreement_item` belongs to one `b2b_quote_agreement`	Defines the products and commercial terms covered by the agreement.
`b2b_quote_status_transition` connects two `b2b_quote_status`	Defines which status changes are allowed in a Store View.
Quote category and tag assignments belong to one `b2b_quote`	Support internal classification, filtering and reporting.

Add-on records

Relationship	Why it matters
`b2b_quote_signature_request` belongs to one `b2b_quote`	Keeps OpenSign requests and their progress with the quote being signed.
`b2b_quote_pdf_layout` belongs to one `store`	Allows the PDF Designer layout to vary by Store View.

Use the module repositories, service contracts or Admin screens for changes. Direct database writes bypass quote validation, totals, workflow rules and revision handling.

Common Issues

Start with the failed step, the actor, and the quote's current state. A missing storefront action, a rejected status change, and an expired-quote cron problem have different causes; clearing every cache or reindexing every indexer rarely explains the underlying issue.

Before changing configuration, record:

- quote ID and increment number
- store view and customer group
- customer, guest, administrator, REST, or GraphQL context
- current state and status
- exact action and error message
- request time for matching the event to Magento logs

“Add to Quote” is not visible

Check these items in order:

1. `MageB2B_B2BQuote` is enabled and `b2bquote/general/enable` resolves to `1` for the current store.
2. The current customer group is selected under **Allowed Customer Groups**. Guest visibility additionally requires guest quotes to be enabled.
3. **Display on Product Page** or **Display on Category Page** is enabled for the location you are checking.
4. The product type and page are handled by the installed storefront implementation.
5. If the store uses Hyvä, `MageB2B_B2BQuoteHyva` is installed and the Hyvä CSS sources have been rebuilt.
6. Full-page cache and block cache were cleaned after configuration or layout changes.

Test once as the affected customer rather than only as an administrator. Customer-group and store-scope differences are common causes.

The customer cannot create or submit a quote

Creation is refused

Review the store-scoped limits:

- `b2bquote/general/max_quotes_per_customer`
- `b2bquote/general/max_quote_items`
- `b2bquote/general/max_item_qty`
- `b2bquote/general/allowed_customer_groups`
- `b2bquote/customer_experience/allow_empty_draft_quote`

A value of `0` disables the corresponding quote-count or item-count limit where documented by the setting. Do not assume it means zero allowed records.

Submission is refused

Check that the quote contains the required data for its workflow:

- at least one valid item unless the current operation explicitly allows an empty draft
- billing and shipping data when required
- shipping method when `b2bquote/shipping/required` is enabled
- payment method when `b2bquote/payment/required` is enabled
- a permitted transition from the current status for the customer actor

If the public message is deliberately generic, correlate the request time with `var/log/system.log` and `var/log/exception.log` to find the internal cause without exposing it to the customer.

A status change is rejected

B2B Quote separates the system state from the configurable status. A status transition record controls the source status, target status, allowed actor, note requirement, and notification behavior.

1. Open **B2B Quotes > Status Transitions**.
2. Confirm that a transition exists for the quote's store, source status, target status, and actor.
3. If **Workflow Rules Validate Transitions** is enabled, review active workflow rules as well.
4. Supply a note when the transition requires one.
5. Confirm the administrator's role grants the required quote permission (ACL resource).

Use the transition **Health Check** before manually editing core workflow records. The **Reload Fixtures** action can restore core data, but review its impact in a non-production environment first.

Expiration, reminders, draft cleanup, or revision cleanup does not run

All five module jobs are registered in Magento's `default` cron group:

Job	Schedule
`b2bquote_quote_check_expired`	Daily at 02:00
`b2bquote_send_expiration_reminders`	Hourly
`b2bquote_delete_old_drafts`	Daily at 03:00

Job	Schedule
`b2bquote_cleanup_old_revisions`	Daily at 04:00
`b2bquote_cleanup_temporary_attachments`	Hourly at minute 15

Run Magento's default group once for diagnosis:

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

Then inspect `cron_schedule` for the exact job code and check `var/log/cron.log`, `var/log/system.log`, and `var/log/exception.log`. Also verify:

- the store-local expiration date and status are eligible
- expiration reminder emails are enabled and intervals are configured
- draft lifetime and notice settings are greater than zero where needed
- revision cleanup is enabled and its retention period is configured

Do not create a separate `b2bquote` cron group; the package does not declare one.

Pricing rules do not apply as expected

1. Confirm `b2bquote/pricing_rules/pricing_rules_enabled` is enabled for the quote's store.
2. Check the rule's active dates, priority, store/customer conditions, and quote conditions.
3. Decide whether rule stacking is allowed. With stacking disabled, evaluation stops after the first applicable rule.
4. Check whether an administrator has already entered an offered item price. Automatic repricing is designed to preserve existing manual offers in supported save flows.
5. Recalculate the quote totals and inspect the applied rule IDs.

Magento catalog reindexing is relevant only when the underlying catalog data or index is stale. It is not a general repair step for quote-rule configuration.

Accepted prices or adjustments are missing from the cart or order

Check the configured accept mode and these settings:

- `b2bquote/general/accept_mode`
- `b2bquote/general/allow_quote_accept_mode_choice`
- `b2bquote/general/clear_cart_before_accept_add_to_cart`
- `b2bquote/general/clear_cart_after_conversion`
- `b2bquote/order_creation/price_change_behavior`

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

Confirm that the quote reached a state allowed for acceptance and that the selected transition exists. If conversion fails, do not repeatedly submit the same request until you know whether an order or cart update was already created.

Shipping methods are missing

Verify that the quote has a complete shipping address and that Magento can estimate rates for its products and quantities. Then check:

- `b2bquote/shipping/required`
- `b2bquote/shipping/disallowed_methods`
- Magento carrier enablement, country restrictions, price/weight rules, and store scope

The quote module can disallow methods, but it cannot make a carrier method available when Magento's carrier configuration rejects the request.

Payment methods are missing

Check `b2bquote/payment/disallowed_methods` and the payment method's own country, currency, order-total, customer, and store restrictions. B2B Quote filters Magento's available methods; it does not reactivate a method rejected by its payment provider or another availability rule.

Inventory reservation is not balanced

Inventory reservations can be created on approval and released on rejection, expiration, or order creation, depending on configuration. Review:

- `b2bquote/inventory/reserve_on_approval`
- `b2bquote/inventory/release_on_expiration`
- `b2bquote/inventory/release_on_rejection`
- the reservation compensation code
- the quote's status history and any resulting order

Do not insert or delete MSI reservation rows manually. First establish which lifecycle event ran and whether it was retried. Preserve logs and database evidence for support.

Email notifications do not arrive

1. Confirm quote notifications are enabled for the quote's store.
2. Check the sender identity, administrator recipients, and the template for the specific event.
3. For reminders, also check the direct reminder flag and configured intervals.

4. Test another Magento transactional email through the same transport.
5. Review `var/log/system.log` and `var/log/exception.log` at the action time.

The module uses Magento's mail transport. It does not require the `async.operations.all` consumer for its normal notification observers, and Magento does not guarantee a `var/log/mail.log` file.

PDF generation fails or the button is unavailable

- Check whether the quote's current status is selected under **PDF Download Restricted Statuses**.
- Confirm company fields, logo file, and chosen base layout are valid for the store view.
- If the PDF Designer add-on is installed, confirm that the selected custom layout still exists and is valid for the current store.
- Review font and image errors in Magento logs.
- For a stale designer preview, save the layout again and confirm that the request reaches the current layout definition.

See PDF Export & Layouts and PDF Designer Add-On.

REST returns 401 or 403

- Use an administrator/integration token for ACL-protected routes.
- Use a customer token for `self` routes.
- Grant the integration the exact `MageB2B_B2BQuote::*` resource declared for the route.
- Confirm that `MageB2B_B2BQuoteApi` is enabled.

The REST add-on does not provide quote webhooks or its own rate-limit configuration. See REST API Add-On for the supported routes.

GraphQL rejects an owned-quote operation

Confirm that `MageB2B_B2BQuoteGraphQl` is enabled, the customer token is current, and the quote belongs to that customer. A valid customer token still cannot bypass status transitions or ownership checks. Refresh the client's cached schema after module upgrades.

Import validation fails

Use the header from an export or sample file for the same entity and installed schema. Check encoding, delimiter, required identifiers, and behavior. CLI imports require one of `append`, `add_update`, `replace`, or `delete`.

Keep the file during diagnosis:

```
php bin/magento b2bquote:import-projects \
  var/import/b2bquote_projects.csv \
  --behavior=append \
  --delete_file_after_import=0
```

The add-on prints row-specific validation errors before it attempts the import.

Information to include in a support request

- base and add-on package identity and dependency constraints
- Magento and PHP versions
- store view and actor type
- quote increment number and current status, without customer-sensitive attachments
- exact reproduction steps and error text
- relevant log excerpt around the request time
- whether the problem reproduces with third-party checkout, payment, shipping, and theme customizations disabled in a safe staging environment

Do not send access tokens, passwords, complete customer exports, or production database dumps through a normal support message.

Related

- Configuration
- Cron Jobs
- Admin Permissions
- Quote Lifecycle
- REST API Add-On
- GraphQL Add-On
- CSV Import/Export Add-On

FAQ

What is the difference between a quote and a Magento cart?

A cart is prepared for checkout at the current catalog prices. A B2B quote is a separate negotiation record with its own items, messages, attachments, addresses, offered prices, expiration and workflow history. The customer can accept an approved quote only through the configured acceptance flow.

What is the difference between a quote state and a status?

The state describes the fixed stage understood by the extension, such as Draft, In Review, Approved or Ordered. A status is the store-specific business label shown to users. You can add statuses such as **Commercial Review** without changing the underlying In Review state.

See Quote Lifecycle for the full model.

Can customers negotiate prices and quantities?

Yes. A customer can submit requested quantities and, when allowed by the workflow, respond to an offer. Sales users can set offered prices, discounts, fees and validity dates. Which action is available at a particular moment depends on the current status and its configured transitions.

Can guests request a quote?

Yes, when guest quotes are enabled. The request is accessed through a secure token rather than a customer session. A guest quote still follows the quote workflow, but customer-account features that require a signed-in identity are not available.

What happens when a quote is accepted?

The configured acceptance mode decides the result. The extension can create the order directly or place the agreed items into the cart so the customer completes Magento checkout. Direct order creation needs usable addresses, shipping and payment information on the quote.

Does an approved quote reserve stock?

Not by default. Approval records a commercial offer; it is not the same event as placing an order. Stock is handled according to the configured inventory-reservation behavior and the later cart or order conversion. Test the chosen policy with your inventory setup (including multi-source inventory, if used) and your normal fulfillment process.

Can a quote expire automatically?

Yes. Quotes can have a validity date, and cron jobs handle expiration and reminders. Magento cron must be running for those time-based actions. See Cron Jobs.

Can we use our own review steps?

Yes. Add business-specific statuses and connect them with explicit transitions. Each transition can be limited to customers, administrators or system automation and can require a note. Keep the fixed state behind each status aligned with what the step actually means.

Are shipping and payment methods stored with the quote?

The quote can carry address, shipping and payment selections, but Magento still validates whether those methods are available when the cart or order is created. A method can therefore become unavailable after configuration, address or carrier changes.

Does the module provide a quote PDF?

The base module can generate a standard quote PDF. The optional PDF Designer adds managed layouts and more control over the document design.

Is an API included in the base module?

The base module provides the Magento Admin and storefront workflows. REST and GraphQL are separate add-ons. See REST API and GraphQL.

Where should I start when an action or total looks wrong?

Record the quote ID, current status, customer or admin action, store view and expected result. Then follow Common Issues, which covers transitions, totals, conversion, uploads, email and cron-dependent behavior.