Quote Categories

B2B Quote Documentation

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

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Magento 2 Extension B2B Quote

Quote Categories

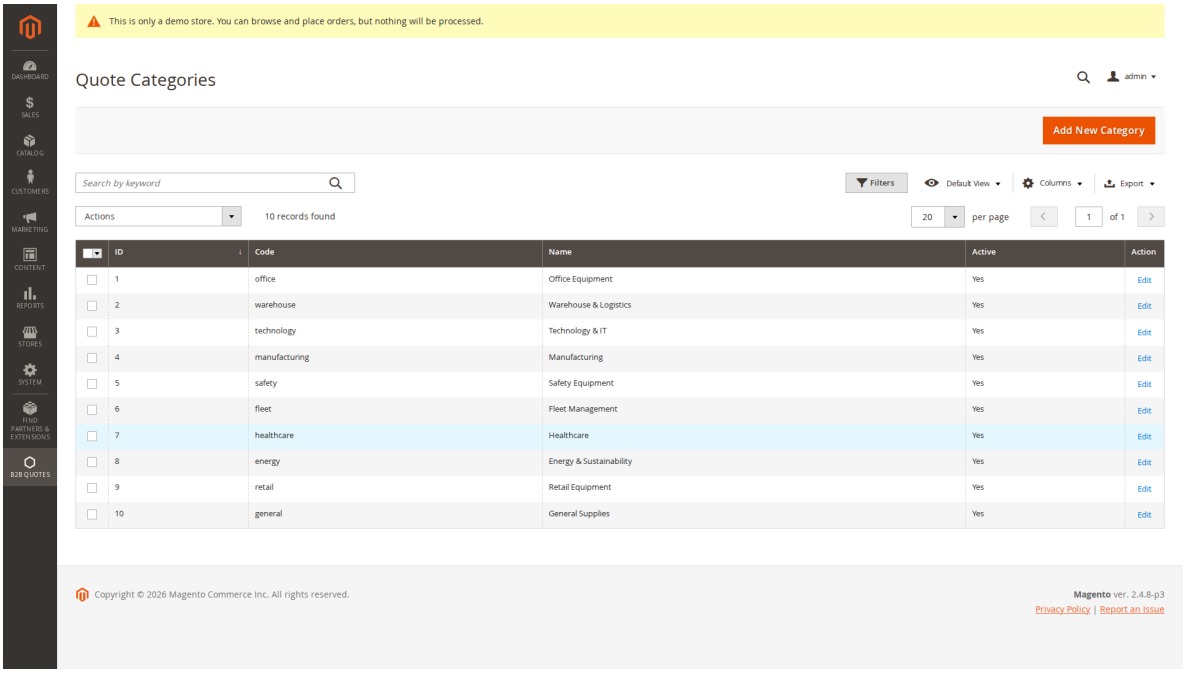
Categories classify quotes with a controlled, reusable vocabulary. A quote can carry more than one category, making categories suitable for stable groupings such as product division, request type, or internal responsibility.

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