



SOFTWARESILOS

B2B Quote Documentation

PDF Manual

MODULE

b2b-quote

LAST UPDATED

2026-03-29

Quote Categories

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

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

Location:

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

How Categories Are Used

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

Recommended Setup

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

API & Import/Export

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

See:

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

Screenshot placeholder: categories grid + category editor

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