



SOFTWARESILOS

B2B Quote Documentation

PDF Manual

MODULE

b2b-quote

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Projects & Categories

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

Organize quotes using projects and categories.

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

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

Projects

Projects allow customers to group related quotes.

Customer View

Customers can:

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

Project Fields

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

Admin Project Management

Sales > B2B Quotes > Projects

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

Categories

Internal classification for admin organization.

Category Configuration

Sales > B2B Quotes > Quote Categories

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

Category Assignment

Assign categories to quotes:

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

Category Uses

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

Tags

Flexible labeling for quick identification.

Adding Tags

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

Tag Features

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

Quote Grouping

By Customer

View all quotes for a customer:

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

3. Click "B2B Quotes" tab

By Product

Find quotes containing a product:

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

By Sales Rep

Filter by assigned admin:

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

Organization Best Practices

Project Structure

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

Category Strategy

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

Tag Usage

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

Reports by Organization

Project Reports

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

Category Reports

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

Related

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