Projects, Categories, and Tags

B2B Quote Documentation

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

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Magento 2 Extension B2B Quote

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