Pricing Rules

B2B Quote Documentation

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

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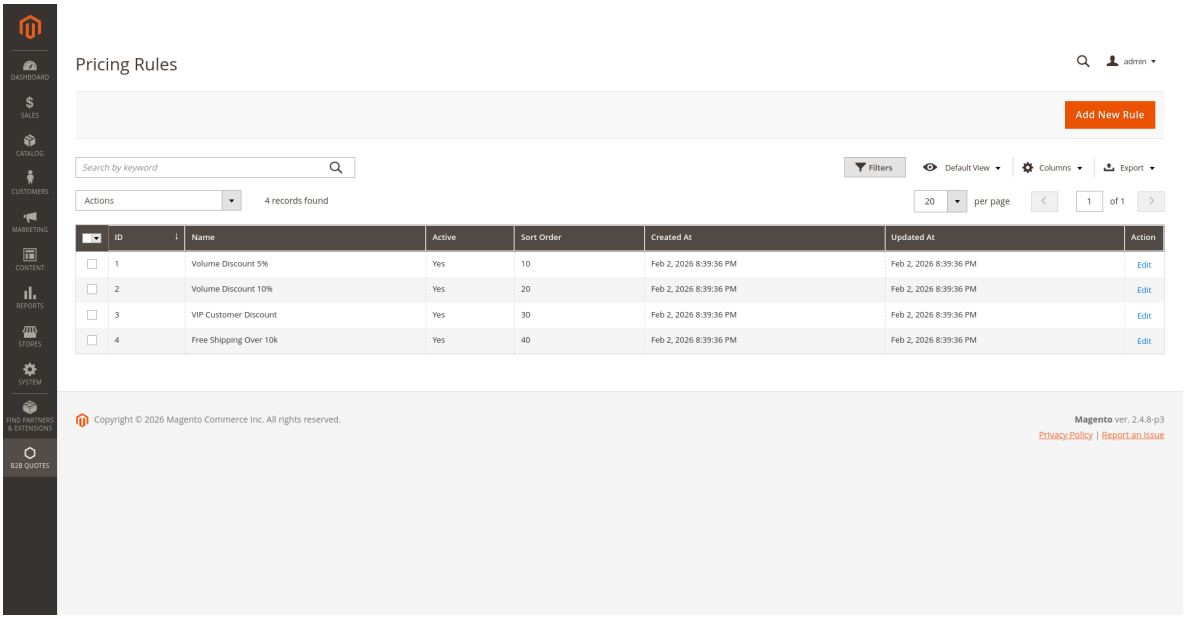
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Magento 2 Extension B2B Quote

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