



SOFTWARESILOS

B2B Quote Documentation

PDF Manual

MODULE

b2b-quote

LAST UPDATED

2026-03-29

Projects

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

Projects help customers (and admins) group related quotes (e.g., one construction site, one procurement campaign, one tender).

Location:

- **Sales → B2B Quotes → Projects**

Common Workflow

1. Customer creates or selects a project
2. Quotes are assigned to the project
3. Sales can filter by project and track totals and status distribution

Typical Project Fields

- Name
- Description / notes
- External reference (ERP / internal ticket)
- Budget and deadlines (depending on setup)

Automation

Projects can be used in:

- filtering and dashboards
- workflow rule conditions

Import/Export

Projects can be imported/exported via the CSV add-on:

- **CSV Quote Import/Export Add-On**

Screenshot placeholder: projects grid + project editor

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