



Projects

B2B Quote Documentation

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

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Projects

Projects keep several quote requests for the same customer together. For example, a buyer can create **Q4 Warehouse Refit** and use it for separate shelving, safety equipment, and office-furniture quotes.

Create a project in Magento Admin

Open **B2B Quotes > Projects** and select **Add New Project**.

Field	Meaning
Customer	Owner of the project; required
Name	Customer-facing project name; required
Description	Optional context for the purchasing initiative
Active	Whether the project remains available for selection

Save the project, then select it on a quote belonging to the same customer. The grid shows ID, customer email, name, active state, and created/updated dates.

The screenshot shows the 'Projects' section in the Magento Admin interface. On the left is a sidebar with navigation links: DASHBOARD, SALES, CATALOG, CUSTOMERS, MARKETING, CONTENT, REPORTS, STORES, SYSTEM, and B2B QUOTES. The main area has a search bar and a table of projects. The table has 10 records, all with 'Active' status and creation/updated dates of 'Feb 2, 2026 8:39:36 PM'. The 'Action' column contains an 'Edit' link for each row. A sidebar on the right contains a search icon, a user icon labeled 'admin', and an 'Add New Project' button. Below the table, there are pagination controls showing '20 per page' and '1 of 1'.

ID	Customer Email	Name	Active	Created At	Updated At	Action
1	john.smith@northwind-supply.com	Office Renovation Project	Yes	Feb 2, 2026 8:39:36 PM	Feb 2, 2026 8:39:36 PM	Edit
2	sarah.johnson@northwind-supply.com	Warehouse Expansion Project	Yes	Feb 2, 2026 8:39:36 PM	Feb 2, 2026 8:39:36 PM	Edit
3	michael.williams@northwind-supply.com	IT Infrastructure Upgrade	Yes	Feb 2, 2026 8:39:36 PM	Feb 2, 2026 8:39:36 PM	Edit
4	emily.brown@northwind-supply.com	Manufacturing Automation	Yes	Feb 2, 2026 8:39:36 PM	Feb 2, 2026 8:39:36 PM	Edit
5	david.miller@northwind-supply.com	Fleet Equipment Purchase	Yes	Feb 2, 2026 8:39:36 PM	Feb 2, 2026 8:39:36 PM	Edit
6	jessica.davis@northwind-supply.com	Logistics Software Implementation	Yes	Feb 2, 2026 8:39:36 PM	Feb 2, 2026 8:39:36 PM	Edit
7	robert.wilson@northwind-supply.com	Retail Store Setup	Yes	Feb 2, 2026 8:39:36 PM	Feb 2, 2026 8:39:36 PM	Edit
8	amanda.taylor@northwind-supply.com	Security System Installation	Yes	Feb 2, 2026 8:39:36 PM	Feb 2, 2026 8:39:36 PM	Edit
9	christopher.anderson@northwind-supply.com	Sustainable Energy Project	Yes	Feb 2, 2026 8:39:36 PM	Feb 2, 2026 8:39:36 PM	Edit
10	michelle.thomas@northwind-supply.com	Healthcare Equipment Procurement	Yes	Feb 2, 2026 8:39:36 PM	Feb 2, 2026 8:39:36 PM	Edit

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Customer workflow

An authenticated customer can create a project from the storefront project area and select one while creating or editing an eligible quote. Project access is customer-owned: a buyer must not be able to attach a quote to another customer's project.

What projects do not contain

The current project record does not contain budget, start date, deadline, external reference, project status, assigned administrator, or calculated project total fields. Store those values in the owning business system if the implementation needs them; do not rely on undocumented database fields.

Deactivate or delete?

Deactivate a project when it should remain part of quote history but should not be selected for new work. Before deleting one, review its related quotes and agreements. Deletion should not be used as a substitute for closing a purchasing initiative in another system.

Import and export

The optional CSV add-on provides the `b2bquote_projects` entity and the command:

```
php bin/magento b2bquote:import-projects \  
var/import/b2bquote_projects.csv \  
--behavior=append \  
--delete_file_after_import=0
```

Use the customer email expected by the installed entity format and start with a small file. See [CSV Quote Import/Export Add-On](#).

Related guides

- [Projects, Categories, and Tags](#)
- [Quote Management](#)
- [Agreements and Call-Offs](#)