Quote Fees

B2B Quote Documentation

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

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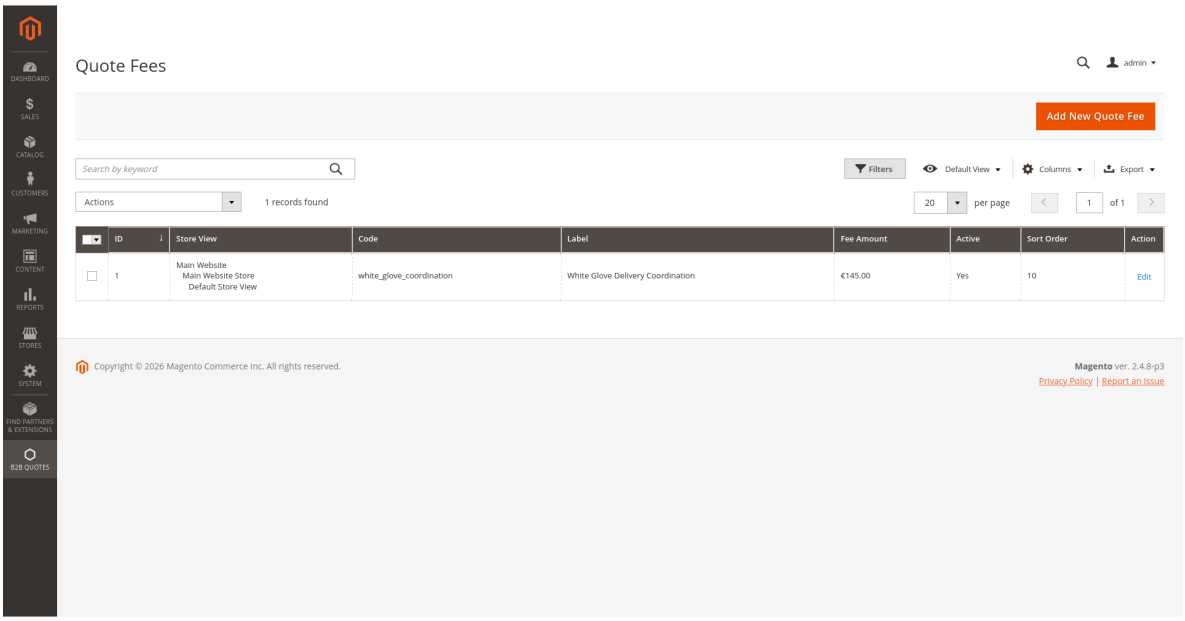
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EXTENSION
Magento 2 Extension B2B Quote

Quote Fees

Quote fees are named fixed charges that can be added to a quote—for example, special packaging, expedited handling, or a documentation fee. Create the reusable fee first, then assign it manually or through a workflow rule.

Open **B2B Quotes > Quote Fees**.



Create a fee

1. Select **Add New Quote Fee**.
2. Choose **All Store Views** or one specific store view.
3. Enter a unique lowercase **Code** using letters, numbers, and underscores.
4. Enter the customer-facing **Label**.
5. Enter the fixed **Fee Amount**.
6. Set **Active** to Yes and choose the sort order.
7. Save, then apply the fee to a test quote.

Field reference

Field	Purpose
Store View	Controls where the fee is available.
Code	Stable internal identifier. Use lowercase letters, numbers, and underscores.
Label	Description shown in quote and order totals.

Field	Purpose
Fee Amount	Fixed amount of the fee in the applicable store currency.
Active	Makes the fee available for assignment.
Sort Order	Controls its position in selectable lists.

Tax configuration

The extension provides three related settings:

- **Apply Tax** — includes the fee in tax calculation.
- **Fee Includes Tax** — treats the configured amount as tax-inclusive and extracts the tax portion.
- **Tax Class** — selects the tax class used for the fee.

If tax is enabled, test the fee with the actual customer groups, countries, tax rates, and display settings used by the store. A correct result in one jurisdiction does not prove the same configuration for another.

Where the fee goes

When a quoted offer becomes an order, the fee and its tax amounts are carried into the order totals. The extension also accounts for those values when invoices and credit memos are created. Always verify partial invoicing and refunds if your operation uses them.

Manual and automated assignment

An administrator can select a fee while preparing a quote. A Workflow Rule can also set or clear a fee when an event and its conditions match.

Use one method as the clear source of truth for each fee. If both a person and an automation rule can change it, document when the rule runs so the result is not surprising.

Before activating a fee

- Use a label customers can understand on a purchasing document.
- Confirm whether the amount is tax-inclusive or tax-exclusive.
- Test quote, order, invoice, and credit-memo totals.
- Test currency and store-view scope where applicable.
- Confirm the fee is not already represented as shipping, a product line, or another surcharge.

Related pages

- Workflow Rules
- Quote Management
- Settings Reference