



SOFTWARESILOS

B2B Quote Documentation

PDF Manual

MODULE

b2b-quote

LAST UPDATED

2026-03-29

Quote Management

B2B Quote Documentation · </b2b-quote/admin/quotes>

Manage customer quotes from the admin panel.

Screenshot placeholder: quotes grid
File: `./_screenshots/admin-quotes-grid.png`

Quote Grid

Sales > B2B Quotes > Quotes

Grid Columns

Column	Description
Quote ID	Unique identifier
Customer	Customer name and email
Company	Customer's company
Status	Current quote status
Items	Number of line items
Subtotal	Quote total value
Created	Submission date
Updated	Last modification
Assigned To	Responsible admin
Expires	Validity end date

Filtering

Filter quotes by:

- Status
- Customer
- Date range
- Assigned admin
- Subtotal range
- Store view

Mass Actions

Action	Description
Assign	Assign to admin
Change Status	Bulk status update

Action	Description
Delete	Remove quotes
Export	Export to CSV
Merge	Merge selected quotes (if enabled/allowed)

Quote Detail View

Screenshot placeholder: quote detail view

File: `./_screenshots/admin-quote-view.png`

Quote Information

Tab	Contents
Overview	Summary, customer, totals
Items	Line items with pricing
Messages	Communication history
Attachments	Uploaded files
History	Status changes, actions
Revisions / Compare	Revision history and comparisons (if enabled)

Editing Quote Items

1. Open quote
2. Go to "Items" tab
3. Click "Edit" on item
4. Modify quantity, price, or discount
5. Save changes

Adding Items

1. Click "Add Products"
2. Search and select products
3. Set quantities
4. Apply pricing
5. Save

Bulk Import/Export (Items)

The module includes item-level bulk operations to speed up editing:

- **Bulk export** generates a CSV with `sku,qty,price,notes`
- **Bulk import** accepts CSV upload or pasted CSV text and supports modes like "add" vs "overwrite"

These are intended for quickly editing quote items, and are separate from the CSV import/export add-on (which can import entities like statuses, tags, transitions, projects, etc.).

See:

- [Frontend Experience](#)
- [CSV Quote Import/Export Add-On](#)

Setting Prices

Method	Description
Custom Price	Enter specific price per item
Discount %	Apply percentage discount
Discount Amount	Apply fixed discount
Apply Rules	Use pricing rules

Quote Actions

Approve Quote

1. Review items and pricing
2. Click "Approve"
3. Add optional message
4. Confirm

Reject Quote

1. Click "Reject"
2. Select rejection reason
3. Add explanation
4. Confirm

Request Information

1. Click "Request Info"
2. Enter questions
3. Send to customer

Convert to Order

After customer accepts:

1. Click "Convert to Order"
2. Review order details
3. Complete order creation

Merge & Split

Admins can also merge/split quotes depending on your configuration and permissions.

See:

- [Merge & Split](#)
- [Admin Permissions \(ACL\)](#)

PDF Export

Admins can generate quote PDFs and (depending on UI) mass-export PDFs.

See:

- [PDF Export & Layouts](#)
- [PDF Designer Add-On](#)

Communication

Sending Messages

1. Go to "Messages" tab
2. Type message
3. Click "Send"
4. Customer receives email notification

Viewing History

1. Go to "History" tab
2. View all actions and status changes
3. Filter by date or type

Attachments

Viewing Attachments

1. Go to "Attachments" tab
2. Click file to download
3. View file details

Adding Attachments

1. Click "Add Attachment"
2. Upload file
3. Add description
4. Save

Quote Assignment

Manual Assignment

1. Open quote
2. Select admin from dropdown
3. Save

Automatic Assignment

Configure workflow rules for auto-assignment based on:

- Customer group

- [Quote value](#)
- [Product categories](#)
- [Round-robin distribution](#)

Reports

Reports > B2B Quotes

Report	Description
Quote Summary	Total quotes by status
Conversion Rate	Quotes converted to orders
Average Value	Average quote amounts
Response Time	Time to first response
By Sales Rep	Performance by admin

Related

- [Analytics Dashboard](#)
- [Status Configuration](#)
- [Projects & Categories](#)
- [Quote Lifecycle](#)
- [Revision Tracking](#)