



Address, Shipping and Payment

B2B Quote Documentation

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

LAST UPDATED
2026-09-26

SOURCE
[Open this article online](#)

EXTENSION
[Magento 2 Extension B2B Quote](#)

| Address, Shipping and Payment

A negotiated quote needs enough fulfilment data to calculate a credible offer and, later, create a valid Magento cart or order. B2B Quote therefore keeps quote-specific billing and shipping addresses, the selected shipping method, and the selected payment method with the commercial record.

Quote addresses

Quote addresses are stored separately from Magento checkout addresses in `b2b_quote_address`. This allows a negotiation to use an address snapshot without changing a customer's normal checkout data.

For logged-in customers, **Use Customer Address Book** controls whether account addresses are available in the quote flow. Customers can also create or copy an address for the quote, depending on the active interface.

Guests enter quote-specific addresses. Once saved, those addresses can be selected again inside the same token-protected quote, but they do not become a customer address book.

The base address fields are first name, last name, street, city, country, and postcode. Store configuration can additionally require company, telephone, fax, prefix, or suffix. Save billing and shipping independently when the business needs different destinations.

Shipping

When shipping information is required, a customer chooses an address and one of the Magento rates available for the quoted products and destination. The extension stores the method, description, and amount and includes shipping in quote totals.

The shipping configuration can require shipping data, apply a free-shipping threshold, and disallow selected Magento methods for B2B quotes and converted carts.

See [Shipping in Quotes](#) for the complete flow.

Rate estimation uses the quote items, subtotal, store, and destination. An empty quote has no rate result. The stored method uses Magento's `carrier_method` code and is accepted only while that method remains available. A method in the disallowed list is filtered from both the quote selection and the later checkout. A configured free-shipping threshold can also change the available amount.

Payment

Under **Payment Settings**:

- **Payment Required** makes payment selection part of the quote workflow;
- **Disallowed Payment Methods** removes selected methods from B2B quotes and from checkout after quote-to-cart conversion.

Payment availability still depends on Magento's normal method configuration, store scope, currency, country, order total, and other method rules.

If payment is required, do not submit an incomplete quote as a final offer. When a method is selected, B2B Quote validates it against the current quote totals and store restrictions. A purchase-order method also requires its PO number when Magento's payment adapter requires one. A method that becomes unavailable after approval is rejected during direct order creation rather than silently replaced.

Acceptance mode changes what is required

Acceptance mode	What happens
Create Order Directly	The extension creates the Magento order immediately. Complete addresses, valid shipping for shippable products, and a selected payment method are required.
Add to Cart	The agreed items and prices move to the cart. Checkout can collect or confirm fulfilment and payment details, subject to B2B Quote restrictions.

For direct order creation, the extension also checks quote expiration, product availability, stock, price-change policy, and the permitted status transition. A guest direct order requires a complete guest shipping address.

Launch checklist

- Test a registered customer using an existing address and a quote-specific address.
- Test a guest from a fresh browser session.
- Test “same as billing” and separate shipping addresses.
- Verify live shipping rates and the free-shipping threshold.
- Disallow one shipping and one payment method and confirm both quote and checkout behaviour.
- Accept a quote through direct order creation and add-to-cart mode.
- Compare quote, cart, order, invoice, and PDF totals, including tax, shipping, discount, and quote fee.
- Change an address after rate selection and confirm stale shipping is not silently retained.

Related pages

- [Shipping in Quotes](#)
- [Cart and Quote-to-Order Conversion](#)
- [Guest Quotes](#)
- [Settings Reference](#)