Quote Analytics

B2B Quote Documentation

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

LAST UPDATED
2026-09-26

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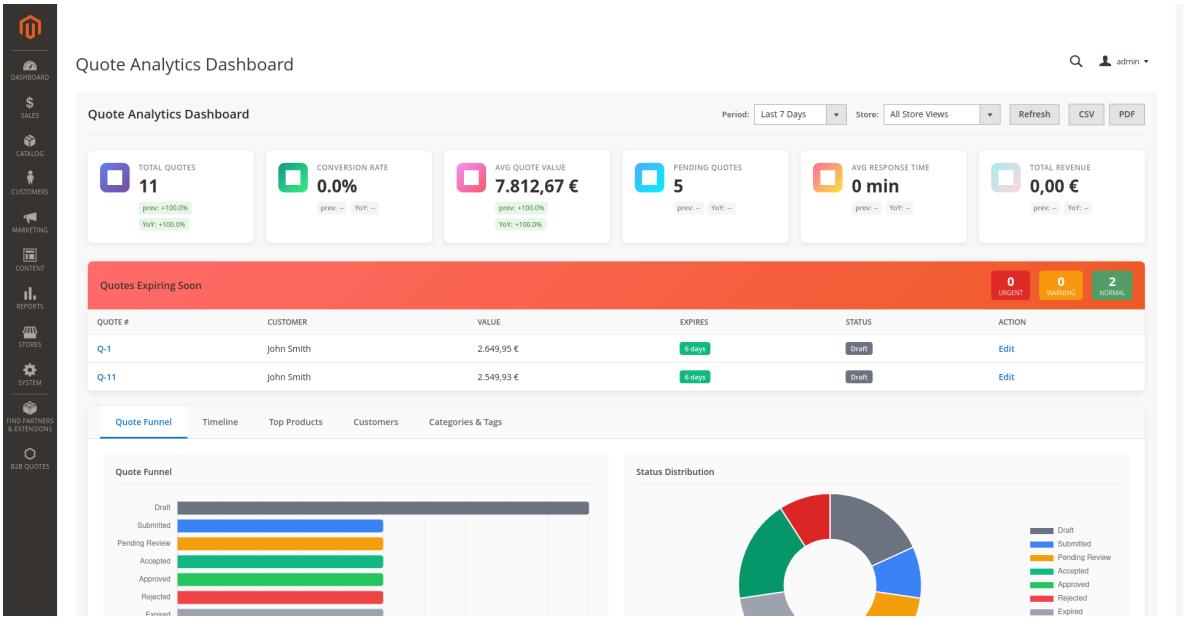
EXTENSION
Magento 2 Extension B2B Quote

Quote Analytics

The quote dashboard helps sales teams move from a list of requests to practical questions: Which offers need attention? Where do quotes stall? Which customers and products generate interest but few orders?

It brings together:

- quote KPIs for a selected period and store view;
- a funnel and status distribution with quote-level drill-down;
- created-versus-converted and revenue timelines;
- quotes expiring in the next seven days;
- most-quoted products and product conversion rates;
- top customers and customer-group activity;
- category, tag, and category-value reporting;
- CSV and PDF exports for authorised administrators.



The dashboard is most useful when statuses, expiration dates, categories, and tags are maintained consistently. It reports the data recorded in the quote workflow; it cannot infer missing classifications or explain a conversion change on its own.

For filters, exports, permissions, drill-downs, and troubleshooting, see Quote Analytics Dashboard.