Email Notifications

B2B Quote Documentation

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

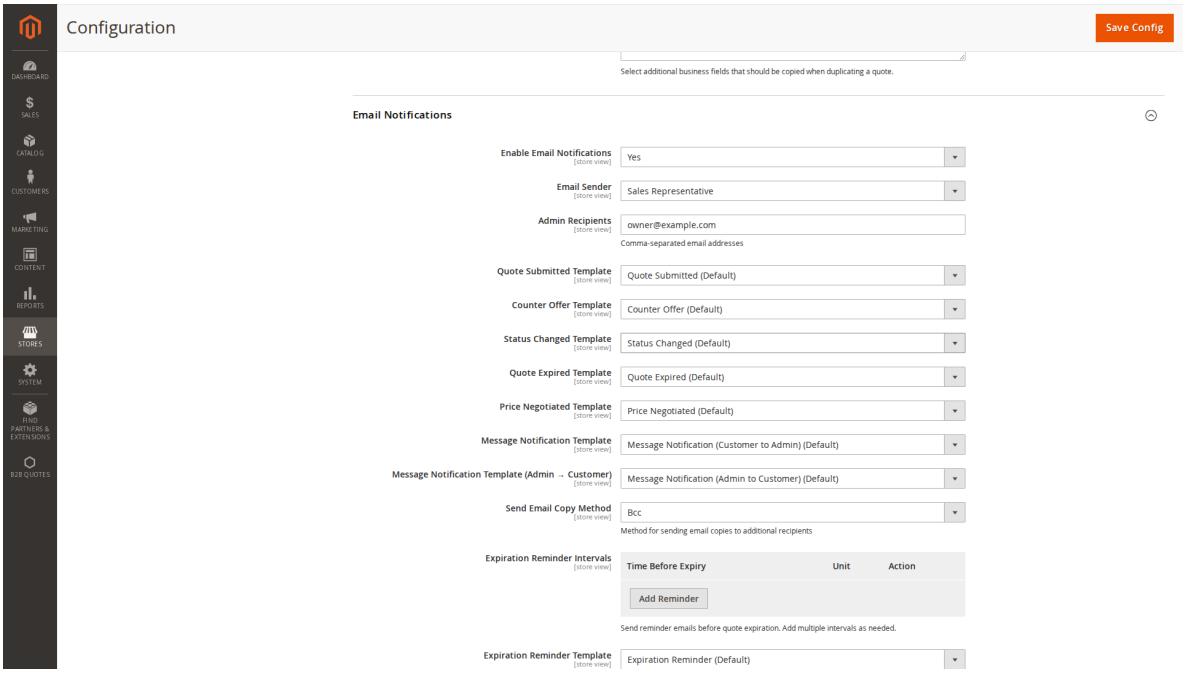
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EXTENSION
Magento 2 Extension B2B Quote

Email Notifications

B2B Quote emails keep customers and the sales team informed without moving the negotiation out of Magento. Templates can cover submission, counter-offers, negotiated prices, status changes, expiration, reminders, and new messages.



Configure delivery

Open **Stores → Configuration → MageB2B → B2B Quote → Email Notifications**.

Setting	Purpose
Enable Email Notifications	Master switch for extension emails.
Email Sender	Magento sender identity used for messages.
Admin Recipients	Comma-separated internal addresses.
Status Changed Template	Default template for status-transition notifications.
Quote Expired Template	Notification after expiration.
Message Notification Template	Message notification sent to the customer or guest.
Message Notification Template (Admin → Customer)	Message notification sent to administrators.
Send Email Copy Method	Controls how additional recipients receive copies.

Setting	Purpose
Expiration Reminder Intervals	Points in time at which reminder emails are sent before expiry.
Enable Expiration Reminder Emails	Turns reminder dispatch on or off.
Expiration Reminder Template	Template used for reminder emails.
Attach Quote PDF	Adds the current quote PDF where supported.
Attach Customer Files	Adds quote attachments where supported.

Templates for specific status changes — for example the submitted-confirmation or counter-offer emails — are selected per transition in the **Email Template** field of the transition record, not in this configuration section. See Status Transitions.

Select templates created for the correct Magento area and review their store-view content. A template being selectable does not guarantee that every variable or link is suitable for the event.

Guest quote links

For guest quotes, event data includes the guest access URL and token information used by the standard templates. Treat that URL as sensitive: it grants access to the associated quote. Test guest emails in a fresh browser session and never use a real customer's token in screenshots or support notes.

Expiration reminders

Enable expiration reminders and configure one or more reminder intervals. The hourly `b2bquote_send_expiration_reminders` cron job finds eligible quotes and sends the configured reminder template.

Intervals should match how the sales team follows up. Too many reminders can train recipients to ignore them, while a single reminder close to expiry may leave no time to respond.

See Cron Jobs.

Attachments and message size

Attaching a PDF or customer files can make the email considerably larger. Confirm transport limits, file sensitivity, and whether the recipient should receive attachments rather than access them through the authenticated or tokenised quote page.

Test matrix

Before launch, test at least:

- a logged-in customer submission;
- a guest submission and its token link;
- a customer and administrator message in each direction;
- an approved offer and status change;
- a counter-offer or pricing update;
- an expiration reminder and final expiration;
- PDF and customer-file attachments when enabled;
- multiple administrator recipients and the chosen copy method.

Use Magento's configured mail transport or a development mail catcher. Verify subject, sender, recipient, store language, links, totals, and attached files—not only that a message exists.

Troubleshooting

If no message arrives, check the master switch, event-specific template, recipients, Magento mail transport, cron for reminders, and application logs. If only guest links fail, confirm guest quotes remain enabled in the quote's store scope and that the template uses the generated guest URL rather than constructing one manually.

Related pages

- Guest Quotes
- Messaging
- Quote PDFs and Layouts
- Cron Jobs