Frontend Experience

B2B Quote Documentation

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

LAST UPDATED
2026-10-13

SOURCE
Open this article online

EXTENSION
Magento 2 Extension B2B Quote

Frontend Experience

This page documents what customers (and guests) see on the storefront, how the quote UI behaves, and which settings control it.

Key Frontend URLs

All storefront routes use `b2bquote` as the URL prefix:

- Quote list: `b2bquote/quote/index`
- Quote view: `b2bquote/quote/view?id={quoteId}`
- Quote edit: `b2bquote/quote/edit?id={quoteId}`
- Quote messages overview: `b2bquote/quote/messages` — a customer-facing page listing the message threads of the customer's quotes

Logged-in customers also find **My Quotes** and **My Agreements** links in their account navigation. The account dashboard shows a **Recent Quotes** block listing the customer's five most recent quotes, and the dashboard's Recent Orders table can show a **Convert to Quote** action per order that starts a quote from that order for eligible customers.

Guest quotes can also be accessed via token-based flows (see Guest Quotes).

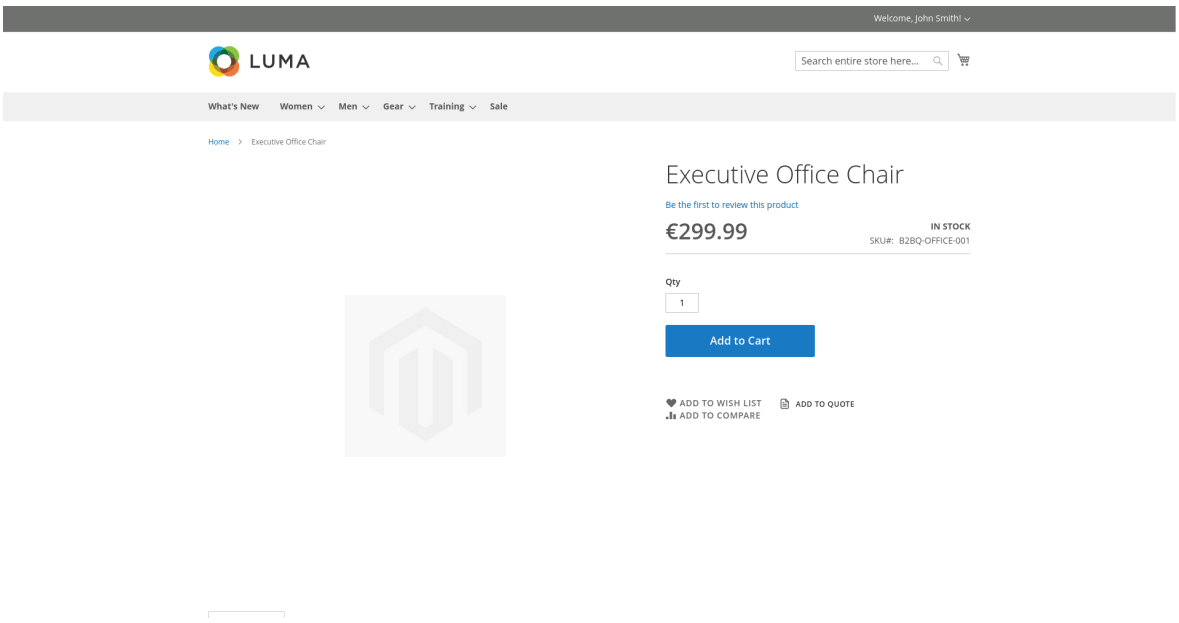
Quote list actions

On the quote list, customers can select several quotes and download a combined PDF, export them as a ZIP archive, or delete them. Individual quotes can also be cancelled from the list when their status permits it. The mini quote dropdown offers a delete action for removing drafts directly.

“Add to Quote” Button

Controlled by:

- `b2bquote/frontend_settings/display_on_product`
- `b2bquote/frontend_settings/display_on_category`
- `b2bquote/frontend_settings/button_text`



Mini Quote (Header Dropdown)

The mini quote is a Magento customer-data component that gives logged-in customers, and a guest with a valid quote token, a quick view of relevant quotes. Its display mode can show all quotes, exclude drafts, show active quotes, or show only quotes that require customer action.

See Mini Quote for the customer-visible fields, configuration, screenshot, and cache troubleshooting.

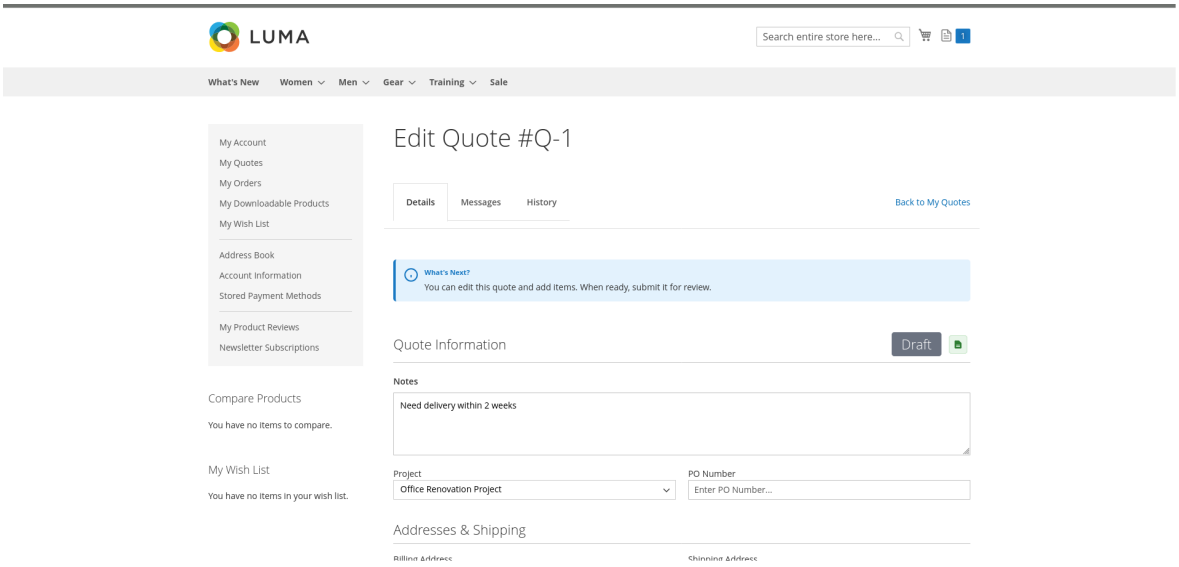
Quote Editing

Typical edit actions:

- update qty / notes
- upload temporary attachments
- bulk import items (CSV paste/upload) for faster entry
- bulk export items to CSV

Bulk items CSV format (export):

```
sku,qty,price,notes
```



Cart to quote conversion

The cart can show a quote action for eligible customers and guests. Cart and Quote-to-Order Conversion is the canonical reference for its settings, validation, and acceptance behavior.

Negotiation UI (Counter Offers)

Controlled by:

- `b2bquote/frontend_settings/allow_counter_offer`
- `b2bquote/pricing/negotiation_enabled`

See:

- Price Negotiation

Customer Experience Settings

Common UX-related settings:

- `b2bquote/customer_experience/use_customer_addressbook`
- `b2bquote/customer_experience/typical_response_time_days`
- `b2bquote/customer_experience/approval_validity_days`
- `b2bquote/customer_experience/draft_lifetime_days`

Related

- Mini Quote
- Bulk Import & Export
- Duplicate & Compare Quotes
- Configuration Fields