Merge and Split Quotes

B2B Quote Documentation

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

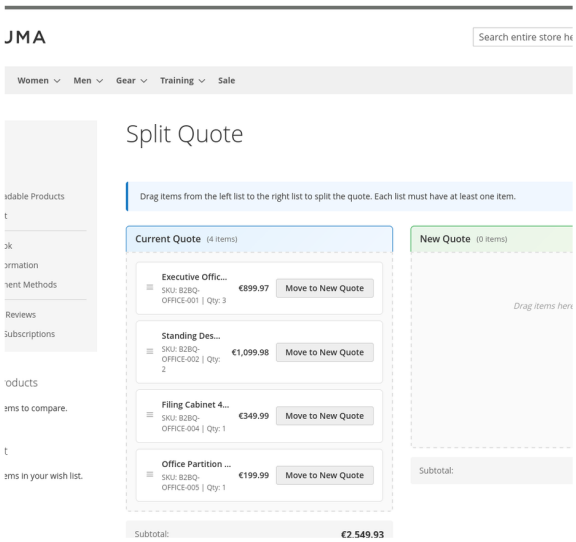
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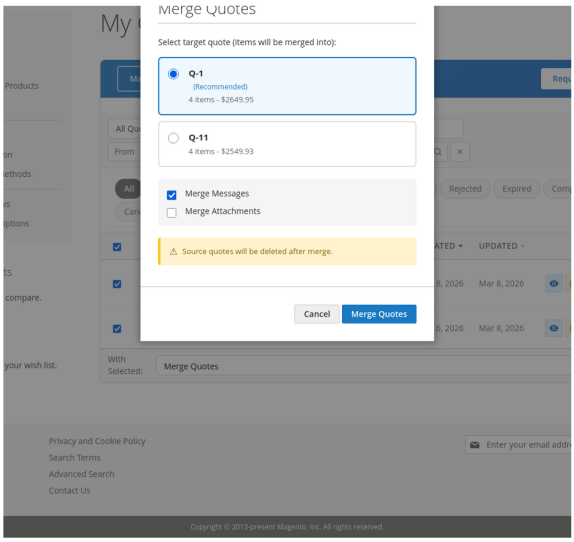
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EXTENSION
Magento 2 Extension B2B Quote

Merge and Split Quotes

Quote merge and split are available in the customer account and in Magento Admin. Customers can organise their own editable quotes. Administrators can perform the same operations when they need to clean up duplicate requests or separate one negotiation into independent offers.





Merge quotes in the customer account

When **Enable Quote Merge (Frontend)** is enabled, a signed-in customer can select at least two compatible quotes from the quote list. The quotes must belong to that customer and remain editable. The same item limit used by the admin operation applies.

The customer chooses the destination quote and whether messages and attachments should be included. The configured defaults preselect those options. The **Delete Source Quotes After Merge** setting controls whether Magento removes the source quotes after a successful merge.

Merge quotes in Magento Admin

From the quote grid, select at least two editable quotes for the same customer and choose the merge action. The extension prevents merges across customers and checks that the combined item count does not exceed the configured maximum per quote.

During the merge, choose whether to include messages and attachments. Configuration can preselect those choices. The **Delete Source Quotes After Merge** setting determines whether the original records are removed after a successful merge.

Before confirming, decide which quote should be the destination and review customer, store, currency, addresses, items, negotiated prices, shipping, payment, expiration,

category, tags, project, and related history. A merge is a business decision, not merely a way to shorten the grid.

Split a quote in the customer account

When **Enable Quote Split (Frontend)** is enabled, a customer can open an editable quote and move selected items into a new quote. At least one item must remain in the original quote.

Split a quote in Magento Admin

Open an editable quote and choose **Split Quote**. Select one or more items for the new quote; at least one item must remain in the original. The operation creates one new quote from the selected item group and keeps the remaining items in the current quote.

The feature does not automatically split by warehouse, delivery date, project, or budget owner. An administrator chooses the item lines explicitly, so use the quote context to decide the correct grouping.

After splitting, review both quotes. In particular, confirm totals, addresses, shipping, expiration, and any context that should differ between the two negotiations.

Configuration and permissions

Under **Stores → Configuration → MageB2B → B2B Quote → Quote Merge & Split**, configure:

- **Enable Quote Merge**;
- default inclusion of messages;
- default inclusion of attachments;
- **Enable Quote Split**;
- deletion of source quotes after merge.

These switches control the customer-account actions. Magento Admin has separate ACL resources for merge and split. Give those permissions only to roles responsible for quote administration.

Safer use in production

- Test merge and split on representative quotes before enabling source deletion.
- Keep source quotes when audit or recovery requirements are unclear.
- Do not merge simply because two quote numbers look similar; verify customer ownership.
- Check the maximum quote-item setting before a large merge.
- Review revision history after the operation when merge/split revision events are enabled.

Troubleshooting

If a customer cannot see an action, check the corresponding frontend setting and confirm the quotes are editable. In Magento Admin, check the administrator's merge or split ACL permission as well. A merge needs at least two quotes for the same customer. A split must leave at least one item in the original quote. Both resulting quotes must stay within the configured item limit.

Related pages

- Quote Management
- Revision Tracking
- Settings Reference