



Order to Quote

B2B Quote Documentation

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

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| Order to Quote

Order conversion lets a logged-in customer create a new quote from one of their existing orders — the action is offered on the customer's order detail page. An administrator with quote-save permission can also create a B2B quote from an order via the **Convert to Quote** button on the order view in Magento Admin (**Sales > Orders**, open the order).

The resulting customer quote opens as an editable draft so the customer can review the copied items, change quantities, add requirements, and submit it for pricing. Magento checks the configured maximum number of active quotes before creating it.

The admin action requires the `MageB2B_B2BQuote::quotes_save` permission and opens the new quote in the B2B Quote editor.

Admin and customer use cases

Order to quote is useful when:

- customers reorder similar project requirements
- a previous order needs negotiation before repeat purchase
- sales teams convert historic orders into managed quote workflows
- B2B customers use quotes for budget approval before purchase

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