



SOFTWARESILOS

B2B Quote Documentation

PDF Manual

MODULE

b2b-quote

LAST UPDATED

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Pricing Rules

B2B Quote Documentation · </b2b-quote/features/pricing-rules>

Automate quote pricing with configurable rules.

Overview

Pricing rules automatically calculate discounts based on:

- Order quantity
- Order value
- Customer group
- Product categories
- Customer history

Rule Configuration

Sales > B2B Quotes > Pricing Rules

Create New Rule

1. Click "Add New Rule"
2. Configure conditions
3. Set discount action
4. Save rule

Rule Structure

Basic Settings

Field	Description
Name	Rule identifier
Description	Rule purpose
Status	Active/Inactive
Priority	Processing order (lower = first)
Store Views	Applicable stores

Conditions

Define when the rule applies:

Condition Type	Example
Quantity	If qty >= 100
Subtotal	If subtotal >= 5000
Customer Group	If group = Wholesale

Condition Type	Example
Category	If product in category X
SKU	If SKU matches pattern

Actions

Define the discount:

Action Type	Description
Percent Off	Percentage discount off original price (by_percent)
Fixed Off	Fixed discount per unit (by_fixed)
To Percent	Adjust price to X% of original (to_percent)
To Fixed Price	Adjust price to a fixed unit price (to_fixed)

Example Rules

Volume Discount

Name: Volume Discount 10%
Condition: Quantity >= 50
Action: 10% discount

Wholesale Pricing

Name: Wholesale Tier
Condition: Customer Group = Wholesale AND Subtotal >= 1000
Action: 15% discount

Category Discount

Name: Clearance Extra Discount
Condition: Category = Clearance
Action: Additional 5% off

Tiered Pricing

Quantity	Discount
10-49	5%
50-99	10%
100-499	15%
500+	20%

Rule Priority

Rules are processed by priority:

1. Lower number = higher priority
2. First matching rule wins (by default)
3. Can configure to stack discounts via `b2bquote/pricing_rules/can_stack_rules`

Rule Application

Automatic Application

When quote is reviewed:

1. System evaluates conditions
2. Matching rules are applied
3. Prices are updated automatically

Manual Override

Admins can:

- Override automatic pricing
- Add additional discounts
- Remove rule discounts

Rule Reports

Track rule effectiveness:

- **Usage Count:** How often applied
- **Discount Given:** Total discount amount
- **Affected Quotes:** Quotes using rule

Best Practices

1. **Clear Naming:** Use descriptive rule names
2. **Test Rules:** Verify with sample quotes
3. **Set Priorities:** Ensure correct processing order
4. **Regular Review:** Update rules for business changes
5. **Document Logic:** Keep records of pricing strategy

Related

- [Price Negotiation](#)
- [Workflow Rules](#)
- [Quote Management](#)

Screenshot placeholder: pricing rule editor (conditions/actions)

File: `./_screenshots/admin-pricing-rule.png`