Shipping in Quotes

B2B Quote Documentation

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

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EXTENSION
Magento 2 Extension B2B Quote

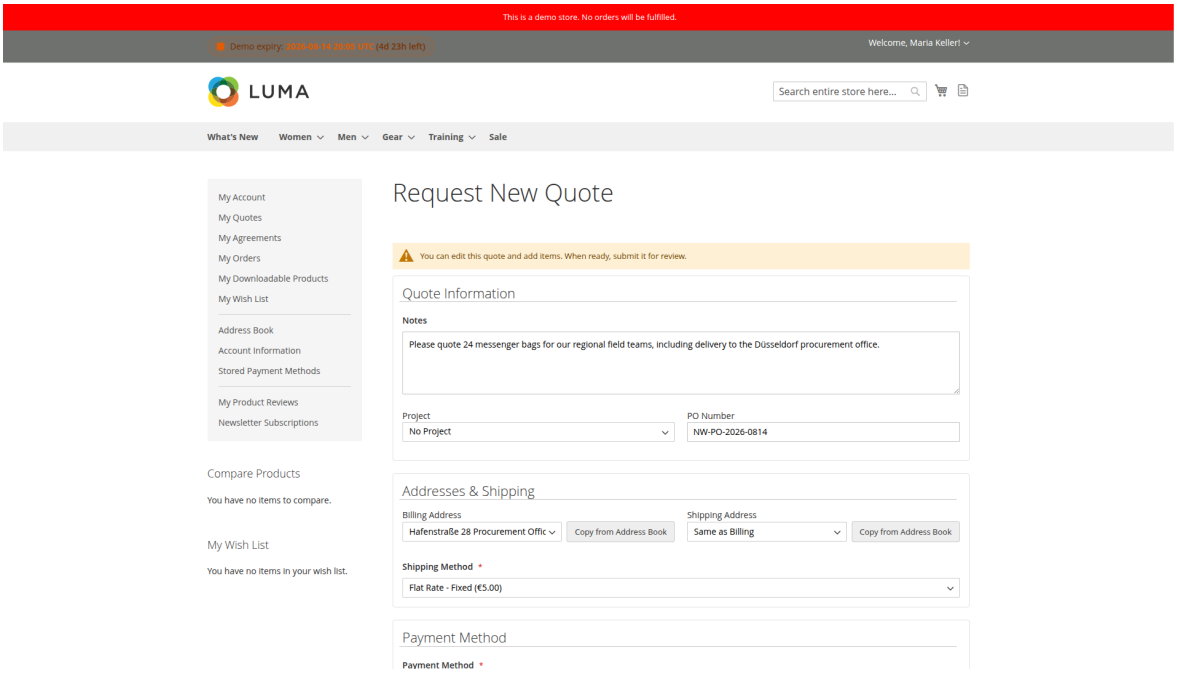
Shipping in Quotes

B2B Quote can collect an address, request live Magento shipping rates, store the chosen method and amount, and carry that selection into quote-to-order processing. This lets delivery cost become part of the offer instead of being discovered only at checkout.

Customer flow

During quote creation or editing, the customer chooses or enters billing and shipping addresses. When a shipping address is available, the storefront can estimate the permitted Magento shipping methods for that address and the current quote contents.

The selected method, description, and amount are stored on the B2B quote and included in the displayed totals. If the address, items, or quantities change, refresh the rates and totals before submitting the offer.



Configuration

Open **Stores → Configuration → MageB2B → B2B Quote → Shipping Settings**.

Setting	Purpose
Shipping Required	Requires shipping information in the quote flow.
Free Shipping Threshold	Makes shipping free when the quote grand total reaches the configured amount; `0` disables this threshold.
Disallowed Shipping Methods	Removes selected methods from B2B quotes and from checkout when a quote is converted to a cart.

The extension uses Magento's configured carriers and rates. It does not make an unavailable carrier available by itself.

Free shipping threshold

When a positive threshold is configured, the storefront can show progress toward free shipping. Once the relevant quote total reaches the threshold, the resulting shipping amount is zero while the selected shipping method remains identifiable.

Test the threshold around its exact boundary and after discounts. Do not assume a catalogue or cart price rule uses the same total definition as the B2B Quote setting.

Quote-to-order checks

Before relying on direct order creation, test that:

- the shipping address belongs to the quote and contains all required fields;
- the selected method is still available for the destination and products;
- the method is not on the B2B Quote disallow list;
- tax-inclusive and tax-exclusive shipping totals display as expected;
- a guest quote has a complete shipping address;
- a converted cart retains the permitted shipping choice or guides the customer to select a replacement.

If a stored method later becomes unavailable or disallowed, the extension can clear it so a valid method must be chosen rather than silently retaining an invalid rate.

Troubleshooting

No rates appear

Verify the shipping address, Magento carrier configuration, destination restrictions, product types and weights, website/stock assignment, and the B2B Quote disallow list. Test the same address and products through normal Magento checkout to separate a carrier problem from a quote problem.

Totals do not change

Re-estimate shipping after changing the address or items and ensure the selected method was persisted. Clear Magento caches and inspect the shipping-estimation browser request if the interface does not refresh.

Submission asks for shipping

Shipping Required is enabled but the quote does not yet have a valid shipping address and method. Complete both before submitting.

Related pages

- Address, Shipping and Payment
- Cart and Order Conversion
- Settings Reference