Configuration

B2B Quote Documentation

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

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EXTENSION
Magento 2 Extension B2B Quote

Configuration

Configure the B2B Quote extension for your business requirements.

Where Settings Live

All settings are under:

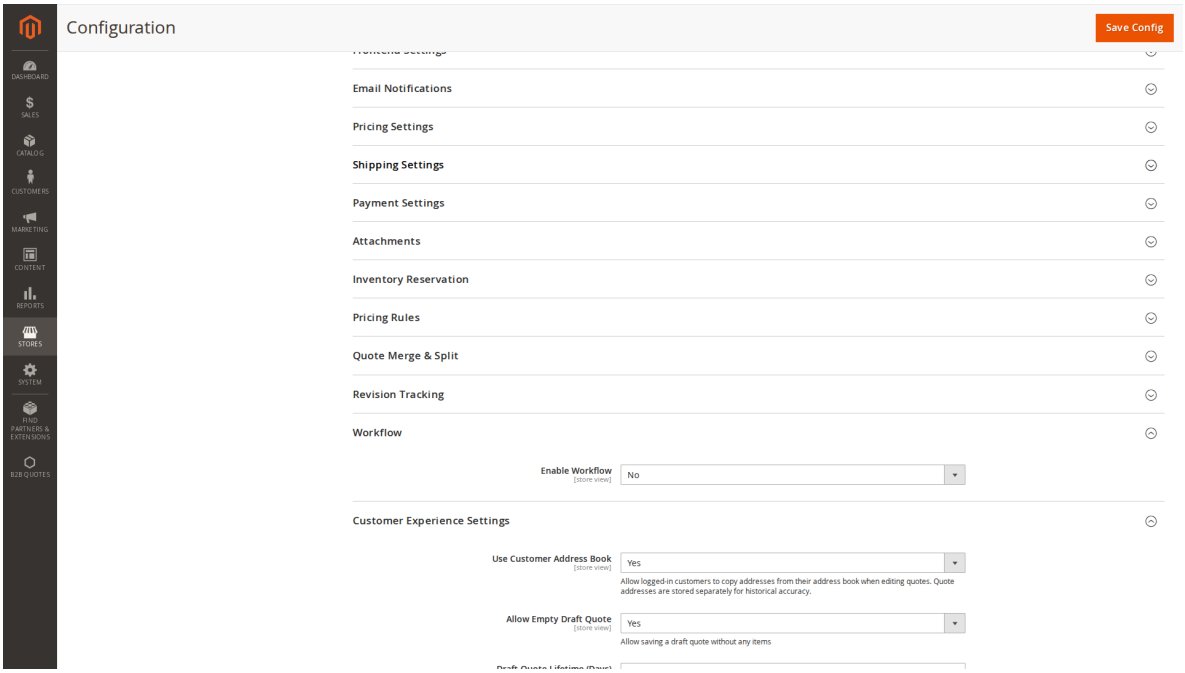
- **Stores > Configuration > MageB2B > B2B Quote**

The underlying config paths are grouped like:

- `b2bquote/general/*` (core settings)
- `b2bquote/frontend_settings/*` (customer-facing behavior)
- `b2bquote/email_notifications/*` (templates and recipients)
- `b2bquote/attachments/*` (uploads)
- `b2bquote/pdf/*` (PDF layout and company data)
- `b2bquote/guest_quote/*` (guest quotes)
- `b2bquote/pricing/*` (negotiation)
- `b2bquote/pricing_rules/*` (auto pricing)
- `b2bquote/workflow/*` (automation)
- `b2bquote/quote_merge_split/*` (merge/split)
- `b2bquote/revision/*` (revision tracking)
- `b2bquote/shipping/*` (shipping)
- `b2bquote/inventory/*` (inventory reservation)
- `b2bquote/quote_fee/*` (fees)
- `b2bquote/payment/*` (payment restrictions for quote checkout)
- `b2bquote/customer_experience/*` (UX defaults)
- `b2bquote/order_creation/*` (order creation safeguards)
- `b2bquote/messaging/*` (quote message limits and per-status disabling)
- `b2bquote/admin_assignment/*` (responsible admin and Admin Inbox notices)

For a detailed list of settings and what they do, see:

- Settings Reference



Recommended First Setup

1. Enable the module: `b2bquote/general/enable`
2. Set quote number format: `b2bquote/general/quote_number_format`
3. Configure statuses and transitions:
   - Status Configuration
   - Status Transitions
4. Configure frontend:
   - `b2bquote/frontend_settings/display_on_product`
   - `b2bquote/frontend_settings/enable_cart_conversion`
5. Configure email notifications:
   - Email Notifications
6. Configure PDF layout/branding (optional):
   - PDF Export & Layouts
7. Enable guest quotes (optional):
   - Guest Quotes

Related

- Installation Guide
- Settings Reference
- Admin Permissions (ACL)
- Cron Jobs
- Quote Management

- Pricing Rules
- Add-Ons