



FAQ

B2B Quote Documentation

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

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EXTENSION
[Magento 2 Extension B2B Quote](#)

FAQ

What is the difference between a quote and a Magento cart?

A cart is prepared for checkout at the current catalog prices. A B2B quote is a separate negotiation record with its own items, messages, attachments, addresses, offered prices, expiration and workflow history. The customer can accept an approved quote only through the configured acceptance flow.

What is the difference between a quote state and a status?

The state describes the fixed stage understood by the extension, such as Draft, In Review, Approved or Ordered. A status is the store-specific business label shown to users. You can add statuses such as **Commercial Review** without changing the underlying In Review state.

See [Quote Lifecycle](#) for the full model.

Can customers negotiate prices and quantities?

Yes. A customer can submit requested quantities and, when allowed by the workflow, respond to an offer. Sales users can set offered prices, discounts, fees and validity dates. Which action is available at a particular moment depends on the current status and its configured transitions.

Can guests request a quote?

Yes, when guest quotes are enabled. The request is accessed through a secure token rather than a customer session. A guest quote still follows the quote workflow, but customer-account features that require a signed-in identity are not available.

What happens when a quote is accepted?

The configured acceptance mode decides the result. The extension can create the order directly or place the agreed items into the cart so the customer completes Magento checkout. Direct order creation needs usable addresses, shipping and payment information on the quote.

Does an approved quote reserve stock?

Not by default. Approval records a commercial offer; it is not the same event as placing an order. Stock is handled according to the configured inventory-reservation behavior and the later cart or order conversion. Test the chosen policy with your inventory setup (including multi-source inventory, if used) and your normal fulfillment process.

Can a quote expire automatically?

Yes. Quotes can have a validity date, and cron jobs handle expiration and reminders. Magento cron must be running for those time-based actions. See [Cron Jobs](#).

Can we use our own review steps?

Yes. Add business-specific statuses and connect them with explicit transitions. Each transition can be limited to customers, administrators or system automation and can require a note. Keep the fixed state behind each status aligned with what the step actually means.

Are shipping and payment methods stored with the quote?

The quote can carry address, shipping and payment selections, but Magento still validates whether those methods are available when the cart or order is created. A method can therefore become unavailable after configuration, address or carrier changes.

Does the module provide a quote PDF?

The base module can generate a standard quote PDF. The optional [PDF Designer](#) adds managed layouts and more control over the document design.

Is an API included in the base module?

The base module provides the Magento Admin and storefront workflows. REST and GraphQL are separate add-ons. See [REST API](#) and [GraphQL](#).

Where should I start when an action or total looks wrong?

Record the quote ID, current status, customer or admin action, store view and expected result. Then follow [Common Issues](#), which covers transitions, totals, conversion, uploads, email and cron-dependent behavior.