B2B Quote

B2B Quote Documentation

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

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EXTENSION
Magento 2 Extension B2B Quote

B2B Quote

SoftwareSilo B2B Quote adds a request-for-quote and negotiation workflow to Magento 2. Customers can build a quote, submit it for review, exchange messages and files, accept an approved offer, and continue to an order or shopping cart according to store configuration.

Overview

The base package contains the storefront and Admin workflows. REST, GraphQL, Hyvä compatibility, entity import/export, OpenSign integration, the visual PDF designer, and sample data are separate packages. Install only the add-ons your project uses.

Key Capabilities

Feature	Description
Quote Lifecycle	Draft → Submit → Review → Approve → Accept → Order
Price Negotiation	Customer counter offers, admin pricing
Messaging	Built-in communication
Attachments	File sharing (specs, contracts)
Agreements	Reusable purchasing agreements and call-off quotes
Pricing Rules	Automated discount calculations
Workflow Rules	Event-driven automation
REST and GraphQL	Optional integration add-ons with customer, guest, and administrator operations
Hyvä compatibility	Optional templates and assets for Hyvä storefronts

Quick Start

1. Install the base extension.
2. Choose the customer groups and quote limits.
3. Check the supplied statuses and allowed transitions.
4. Sign in as an allowed customer and complete one quote from product selection through acceptance.
5. Add and test optional packages from the add-on overview only after the base flow works.

Documentation Sections

Getting Started

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

Features

- Quote workflow from draft to order
- Quote Lifecycle
- Frontend Experience
- Mini Quote
- Price Negotiation
- Quote Totals and Calculation
- Messaging
- Attachments
- Bulk Import & Export
- Guest Quotes
- Revision Tracking
- Duplicate & Compare Quotes
- Merge & Split
- Agreements & Call-Offs
- Cart & Order Conversion
- Cart & Order To Quote
- Address, Shipping & Payment
- PDF Export & Layouts
- Email Notifications
- Shipping
- Inventory Reservation
- Quote Fees
- Categories & Tags
- Analytics Dashboard
- Pricing Rules
- Workflow Rules

Administration

- Analytics Dashboard
- Quote Management

- Agreement Management
- Projects
- Status Configuration
- Status Transitions
- Status and Actor Matrix
- Quote Categories
- Quote Tags
- Quote Fees
- Pricing Rules (Admin)
- Workflow Rules (Admin)
- Projects & Categories (Overview)

Reference

- Add-Ons
- Database Reference
- Configuration Fields
- Troubleshooting
- FAQ

Database Tables

The extension creates these tables:

Table	Purpose
`b2b_quote`	Main quote records
`b2b_quote_item`	Quote line items
`b2b_quote_address`	Quote billing and shipping addresses
`b2b_quote_state`	Fixed lifecycle states behind the configurable statuses
`b2b_quote_status`	Store-aware business statuses
`b2b_quote_status_transition`	Allowed status changes and actor rules
`b2b_quote_expiration_reminder`	Sent expiration reminders per quote
`b2b_quote_project`	Customer projects
`b2b_quote_category` / `b2b_quote_to_category`	Quote categories and their assignment

Table	Purpose
`b2b_quote_tag` / `b2b_quote_to_tag`	Quote tags and their assignment
`b2b_quote_message`	Communication
`b2b_quote_attachment`	File attachments
`b2b_quote_fee`	Quote fees
`b2b_quote_pricing_rule`	Pricing automation
`b2b_quote_workflow_rule`	Workflow automation
`b2b_quote_agreement`	Purchasing agreements created from quotes
`b2b_quote_agreement_item`	Agreement item quantities and agreed prices
`b2b_quote_revision` / `b2b_quote_revision_item`	Revision history of quotes and items

Requirements

Use a Magento Open Source or Adobe Commerce release and PHP runtime listed as supported for the current package. Check the current product compatibility information before installation or an upgrade instead of treating a copied version range as permanent.

The installed Composer metadata is authoritative for dependency resolution.