



SOFTWARESILOS

Sales Staff Extension

PDF Manual

MODULE

staff

LAST UPDATED

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Quote Management

Sales Staff Extension · /staff/addons/quote-management

The Quote add-on (`MageB2B_StaffQuote`) adds a complete quote workflow around staff accounts:

- Staff can create and manage quotes for customers
- Customers can request quotes and view/accept/reject them
- Attachments, quote history, PDFs, and expiry reminders
- Admin management (grid + quote detail view)

Installation

```
composer config bearer.repo.softwaresilo.io <token>
composer config repositories.softwaresilo composer
https://repo.softwaresilo.io/
composer require mageb2b/staff-quote:*
php bin/magento module:enable MageB2B_StaffQuote
php bin/magento setup:upgrade
php bin/magento cache:flush
```

Admin: Staff Quotes

Admin menu:

- **Staff > Staff Quotes**

Screenshot placeholder: Admin staff quote grid

Staff Frontend: Quote Workspace

The add-on registers staff pages under the `staffquote` frontend routes (examples):

- Quote list / dashboard
- Quote view + edit
- Quote PDF export
- Attachments management
- Customer search + product search helpers

Screenshot placeholder: Staff quote list (frontend)

Customer Frontend: Quote Requests & Customer Quote View

Customers get pages and actions (examples):

- Request quote

- View quote
- Accept / reject
- Download attachments (if enabled)
- Create order from quote (optional, configurable)

Screenshot placeholder: Customer quote request form

Configuration

Location: **Stores > Configuration > MageB2B > Staff > Quote**

Key settings (defaults shown):

- `staff/quote/show_request_menu` (default: Yes) - show quote request menu for customers
- `staff/quote/quote_expiry_days` (default: 30)
- `staff/quote/enable_expiry_reminder` (default: Yes)
- `staff/quote/reminder_days_before` (default: 3)
- `staff/quote/quote_number_format` (default: Q-`{increment_id}`)
- PDF settings:
 - `staff/quote/pdf_logo_path`
 - `staff/quote/pdf_company_name`
 - `staff/quote/pdf_company_address`
 - `staff/quote/pdf_company_contact`
 - `staff/quote/pdf_footer_text`
- Customer options:
 - `staff/quote/allow_customer_create_order` (default: No)
 - `staff/quote/show_history_customer_quote` (default: No)
 - `staff/quote/allow_customer_attachments` (default: Yes)
 - `staff/quote/allowed_extensions`
 - `staff/quote/max_attachment_size_mb`
 - `staff/quote/max_attachments_per_quote`

Location: **Stores > Configuration > MageB2B > Staff > Email settings**

- `staff/email/attach_pdf_to_customer`
- `staff/email/attach_quote_attachments`
- `staff/email/max_total_attachments_mb`
- Quote email templates:
 - `staff/email/quote_template`
 - `staff/email/quote_to_customer_template`
 - `staff/email/quote_status_update_template`
 - `staff/email/quote_expiry_reminder_template`
 - `staff/email/quote_internal_notification_template`
 - `staff/email/customer_quote_request_template`

Screenshot placeholder: Quote configuration section

Cron Jobs

The module includes cron jobs for:

- Expiring quotes
- Sending expiry reminders

Make sure Magento cron is running on production.