



Agreement Management

B2B Quote Documentation

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

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SOURCE
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EXTENSION
[Magento 2 Extension B2B Quote](#)

Agreement Management

Agreement management is available in the Magento admin under **B2B Quotes > Agreements**.

Agreement Grid

The grid lists agreement records and provides search, filters, pagination, and mass delete.

Common columns:

Column	Description
ID	Internal agreement ID
Agreement #	Public agreement number, for example AGR-000123
Customer Email	Agreement owner
Name	Agreement name
Status	Active, inactive, exhausted, or expired
Source Quote	Quote that created the agreement
Valid Until	End date for the agreement

Create An Agreement

Admins can create an agreement manually with **Add New Agreement**.

Required data:

- customer
- name
- status

Optional data:

- project
- source quote
- valid from / valid until
- internal notes

The agreement number is generated after the first save if no number exists yet.

Convert A Quote Into An Agreement

Eligible customer quotes can be converted into agreements.

The conversion copies quote items into agreement items and stores:

- agreed quantity from quote item quantity
- agreed price from offered price, with item price as fallback
- source quote relation
- project relation
- store scope
- quote notes on agreement items

Only quotes in eligible workflow states can be converted. See [Agreements & Call-Offs](#).

Agreement Items

Agreement items define what the customer can call off later.

Each item contains:

- product / SKU / name
- agreed quantity
- consumed quantity
- agreed price
- optional validity dates
- notes

Admins can add products to an agreement and update quantity or price as long as the new agreed quantity is not below the already consumed quantity.

From the customer edit page

The Magento customer edit page (**Customers > All Customers > edit**) includes a collapsible **B2B Agreements** section listing that customer's agreements, and a **Create Agreement** button that opens the agreement form with the customer pre-selected.

Customer Account Integration

Customers see agreements in **My Account → My Agreements**.

The detail page shows:

- agreement metadata
- source quote link
- project link if available
- item quantities
- call-off quantity inputs

When a customer starts a call-off, the extension creates a new draft quote linked to the agreement.

Access Control

The admin ACL resource is:

```
MageB2B_B2BQuote::agreements
```

Grant this permission to admin roles that should manage agreements.

Related

- [Agreements & Call-Offs](#)
- [Quote Management](#)
- [Projects](#)
- [Admin Permissions](#)