



Status and actor matrix

B2B Quote Documentation

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

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Status and actor matrix

B2B Quote separates a fixed lifecycle state from the store-scoped status label shown in the admin and storefront. The transition table decides which actor may move a quote and whether a note or notification is required.

Lifecycle states

State	Typical meaning	Usual actor for entry
Draft	Request is being prepared.	Customer or admin
Submitted	Customer sent the request for review.	Customer
In review	Merchant or customer is working on the offer.	Admin or customer
Approved	Merchant released an offer.	Admin
Accepted	Customer accepted the offer.	Customer or permitted admin flow
Ordered	An order was created.	System
Rejected	The current offer was declined.	Admin or customer, when configured
Expired	The expiry process closed the offer.	System
Cancelled	The request was cancelled.	Actor allowed by the transition

Ordered, expired, and cancelled are terminal states in the base lifecycle. Custom statuses still map to one of these states and cannot create a separate state.

Operation matrix

The table describes the normal requirement. A store can narrow it with transitions, ACL, customer-group access, status restrictions, and workflow rules.

Operation	Customer	Admin	System
Create draft	Yes, for an eligible account	Yes, with quote-save permission	No
Add or edit items	Editable customer quote	Editable quote and ACL	Through configured jobs or integrations

Operation	Customer	Admin	System
Submit	Requires customer transition	Can save, but submission is an actor-specific transition	No
Offer or approve	No	Requires admin transition and ACL	Workflow rules may trigger related actions
Counter-offer	Only when enabled for the current state	Can set the offered price	No
Accept	Requires customer transition or guest token permission	Only where the admin action is exposed	Conversion performs the system transition
Expire	No	No direct customer action	Expiry job and system transition
Create order	No direct order service call	Admin conversion action where available	Validates and writes the order

Guest access follows the customer column but uses the quote access token. A token does not bypass status, expiry, configuration, or order validation.

Store scope and defaults

Statuses and transitions can be global or scoped to a store view. The resolver uses the quote's store when it looks for a target status and actor permission. Keep one default status for every state used by the workflow. If a target is not explicitly configured, the state default is used; if neither exists, the action fails with an invalid-transition error.

Required notes and notifications

A transition can require a non-empty note. Customer and administrator notifications are independent settings on the transition. A successful status save dispatches side effects after the transaction commits, so a rolled-back change should not send a transition email.

Health check

When an action is missing, check these values in order:

1. quote store view and current status;
2. target status state and store scope;
3. allowed actor on the transition;
4. required note setting;

5. customer-group and storefront access settings;
6. administrator ACL and any status-disabled feature;
7. workflow rule conditions and notification configuration.

Do not edit the status column directly. Correct the transition or status configuration and test the same action as the affected actor.

Related pages

- [Quote statuses](#)
- [Status transitions](#)
- [Admin permissions](#)
- [Quote lifecycle](#)
- [Quote workflow](#)