



Status Transitions

B2B Quote Documentation

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

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Status Transitions

A status transition is one permitted step from a source status to a target status. It answers three practical questions: who may make the change, whether they must leave a note, and who should be notified afterwards.

Open **B2B Quotes > Status Transitions**.

Status Transitions										
Actions			22 records found		Check System Health Add New Transition					
ID	Store View	From Status	To Status	Allowed For	Require Note	Notify Customer	Notify Admin	Action		
5	All Store Views	Submitted (submitted)	Draft (draft)	Admin	Yes	Yes	Yes	Edit		
6	All Store Views	Submitted (submitted)	Approved (approved)	Admin	No	Yes	Yes	Edit		
7	All Store Views	Submitted (submitted)	Approved (approved)	System	No	Yes	Yes	Edit		
8	All Store Views	Pending Review (in_review)	Approved (approved)	Admin	No	Yes	Yes	Edit		
9	All Store Views	Pending Review (in_review)	Rejected (rejected)	Admin	Yes	Yes	Yes	Edit		
10	All Store Views	Pending Review (in_review)	Draft (draft)	Admin	Yes	Yes	Yes	Edit		
11	All Store Views	Approved (approved)	Accepted (accepted)	Customer	No	Yes	No	Edit		
12	All Store Views	Approved (approved)	Accepted (accepted)	Admin	No	Yes	Yes	Edit		
13	All Store Views	Approved (approved)	Rejected (rejected)	Customer	Yes	Yes	No	Edit		
14	All Store Views	Approved (approved)	Expired (expired)	System	No	Yes	Yes	Edit		
15	All Store Views	Approved (approved)	Cancelled (cancelled)	Admin	No	Yes	Yes	Edit		
16	All Store Views	Approved (approved)	Pending Review (in_review)	Admin	No	Yes	Yes	Edit		
17	All Store Views	Accepted (accepted)	Completed (ordered)	Admin	No	Yes	Yes	Edit		
18	All Store Views	Accepted (accepted)	Completed (ordered)	System	No	Yes	Yes	Edit		
19	All Store Views	Accepted (accepted)	Cancelled (cancelled)	Admin	Yes	Yes	Yes	Edit		
20	All Store Views	Rejected (rejected)	Draft (draft)	Customer	No	No	No	Edit		

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Create a transition

1. Select **Add New Transition**.
2. Choose the relevant **Store View**.
3. Select the **From Status** and **To Status**.
4. Choose who may use it: **Customer**, **Admin**, **Both**, or **System**.
5. Decide whether a note is required.
6. Choose the customer and administrator notification options.
7. Select an email template when the transition should send a notification.
8. Save and test the transition as the intended actor.

Field reference

Field	Purpose
Store View	Applies the transition globally or to a specific store view.
From Status	Current status required before the change.

Field	Purpose
To Status	Status reached after the change.
Allowed For	Limits the action to the customer, an administrator, both, or an automated system process.
Require Note	Prevents the change until the actor provides a reason or comment.
Notify Customer	Sends the configured transition notification to the customer.
Notify Admin	Sends the configured transition notification to the administrator recipient.
Notification Template	Email template used for this transition.

Example approval path

A straightforward merchant-led flow can use these transitions:

From	To	Allowed for	Require note	Typical use
Submitted	Pending Review	Admin	No	A sales user starts reviewing the request.
Pending Review	Approved	Admin	No	The offer is ready for the customer.
Approved	Accepted	Customer	No	The customer accepts the offer.
Approved	Rejected	Customer	Yes	The customer declines and explains why.
Accepted	Completed	System	No	Quote-to-order processing completes the workflow.

The names in your installation may differ because transitions point to configurable statuses, not directly to labels in this example.

Common configuration problems

The expected action is missing

Confirm that a transition exists from the quote's current status and that **Allowed For** includes the person performing the action. Also check the store view: a transition created for another store does not automatically apply here.

“Invalid transition” appears

The target status is not reachable from the current status for that actor. Do not work around this by adding every possible transition. Add the exact business path you want and test it from the real starting status.

A note is requested unexpectedly

Open the matching transition and review **Require Note**. More than one transition can lead to the same target, so check the current source status as well.

No email is sent

Verify the relevant notification checkbox, the selected email template, Magento email delivery, and the configured recipient. A status change alone does not guarantee that both parties are notified.

Design guidance

- Start with the shortest workflow that matches how your sales team actually works.
- Use **System** only for transitions performed by automation, such as expiry or quote-to-order processing.
- Require notes for decisions that need an audit trail, such as rejection or cancellation.
- Avoid duplicate transitions for the same store, source, target, and actor.
- After changing a live workflow, test customer actions, administrator actions, notifications, and automated rules.

Related pages

- [Quote Statuses](#)
- [Quote Lifecycle](#)
- [Workflow Rules](#)
- [Troubleshooting](#)