Quote Statuses

B2B Quote Documentation

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

LAST UPDATED
2026-09-26

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EXTENSION
Magento 2 Extension B2B Quote

Quote Statuses

Quote statuses give your team useful business labels without changing the underlying quote lifecycle. For example, two quotes can both be **In Review** at system level while one is labelled **Technical Review** and the other **Waiting for Purchasing**.

Open **B2B Quotes > Quote Statuses** to view or maintain them.

States and statuses are different

A **state** is a fixed lifecycle stage used by the extension. A **status** is the store-scoped label assigned to one of those states.

The available states are:

State	What it means
Draft	The quote is still being prepared.
Submitted	The customer has sent the request.
In Review	The merchant or customer is working on the offer.
Approved	The merchant has released an offer for the customer.
Accepted	The customer has accepted the offer.
Ordered	The quote has been converted into an order.
Rejected	The current offer was declined; the quote can still continue through a configured transition.
Expired	The quote is no longer valid.
Cancelled	The quote was cancelled.

`Ordered`, `Expired`, and `Cancelled` are final states. Do not create a status expecting it to add a new lifecycle state: custom statuses must always map to one of the states above.

Create a status

1. Select **Add New Status**.
2. Choose the **Store View** that should use the status. Use **All Store Views** for a global status.
3. Select its fixed **State**.
4. Enter a unique **Status Code** and a clear **Label**.
5. Decide whether it is the **Default for State**.
6. Set its position, colour, and optional guidance text.

7. Save the status, then create the transitions that lead into and out of it.

Field reference

Field	Purpose
Store View	Limits the status to one store view or makes it global.
State	Connects the status to a fixed lifecycle stage.
Status Code	Stable internal identifier used by rules and integrations.
Label	Text shown to administrators and customers.
Default for State	Makes this the status selected when the extension enters that state and no more specific target is requested.
Sort Order	Controls where the status appears in lists; lower numbers appear first.
Colour	Helps people recognise the status in quote screens and grids.
Guidance Text	Optional next-step guidance shown with the status. Keep it short and actionable.

There is no separate **Active** switch. If a status should no longer be used, first remove or replace transitions and rules that refer to it, then delete it only after checking existing quotes.

A practical example

Suppose submitted quotes need a commercial check before a specialist reviews the products. You can create two statuses under the **In Review** state:

- **Commercial Review** — default for the state, guidance: “Check customer terms and requested quantities.”
- **Technical Review** — guidance: “Confirm product suitability and delivery requirements.”

The labels help the team understand the next task, while the extension still treats both quotes as being in review. Define the allowed path between them on the Status Transitions page.

Before changing a live workflow

- Keep one default status for every state you use.
- Use short, stable codes; change the customer-facing label instead of repeatedly renaming a code.

- Check pricing rules, workflow rules, email templates, API integrations, and existing transitions before deleting a status.
- Use guidance text for the next action, not for long policy documents.
- Test the customer and administrator paths in a non-production store view first.

Related pages

- Quote Lifecycle
- Status Transitions
- Workflow Rules
- Quote Management