



SOFTWARESILOS

B2B Quote Documentation

PDF Manual

MODULE

b2b-quote

LAST UPDATED

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Status Configuration

B2B Quote Documentation · /b2b-quote/admin/statuses

Configure custom quote statuses for your workflow.

State vs. Status (Important)

B2B Quote typically distinguishes between:

- **State**: fixed lifecycle stage (system-driven, used by business logic)
- **Status**: configurable label used for workflow / UI / filtering (admin-managed)

In practice:

- states describe *where the quote is in the lifecycle* (draft, pending, in_review, approved, accepted, ordered, expired, cancelled...)
- statuses describe *your business process* (e.g. "Needs Tech Review", "Waiting for Vendor", "Approved – Awaiting PO")

See:

- [Quote Lifecycle](#)

Status Management

Sales > B2B Quotes > Quote Statuses

Create Status

1. Click "Add New Status"
2. Configure settings
3. Save

Status Settings

Field	Description
Label	Display name
Code	Unique identifier (cannot change after save)
Color	Display color in grid
Position	Sort order
Is Active	Enable/disable status

Allowed Transitions

Status transitions are configured in a dedicated admin screen:

- [Status Transitions](#)

Tip: If transitions are too strict, admins/customers will see “invalid transition” errors. Start with a permissive matrix, then tighten.

Status Colors

Visual identification in grids:

Default Color	Status Type
Gray	Draft, Pending
Blue	In Progress
Green	Positive (Approved, Accepted)
Red	Negative (Rejected, Expired)
Purple	Final (Ordered)

Custom Status Examples

Needs Approval

```
Label: Needs Approval
Code: needs_approval
Color: Orange
Behavior: Visible to customer, Allow messages
Transitions From: Review
Transitions To: Approved, Rejected
```

On Hold

```
Label: On Hold
Code: on_hold
Color: Yellow
Behavior: Hidden from customer, No editing
Transitions From: Any active status
Transitions To: Review, Rejected
```

Partial Accepted

```
Label: Partially Accepted
Code: partial_accept
Color: Light Green
Behavior: Visible, Allow messages
Transitions From: Approved
Transitions To: Accepted, Negotiation
```

Status Workflow

Simple Workflow

```
Draft → Submitted → Review → Approved → Accepted → Ordered
                        ↓
                      Rejected
```

Advanced Workflow

```
Draft → Submitted → Review → Needs Approval → Approved → Accepted → Ordered
                        ↓           ↓           ↓
                   On Hold   Rejected   Counter Offer
                        ↓           ↓           ↓
                   Review    Re-Review → Approved
```

Translation

Status labels support multiple store views:

1. Open status
2. Switch store view
3. Enter translated label
4. Save

Best Practices

1. **Keep It Simple:** Start with default statuses
2. **Clear Names:** Use descriptive labels
3. **Logical Transitions:** Define sensible workflows
4. **Consistent Colors:** Use color coding meaningfully
5. **Document Changes:** Record custom status purposes

Related

- [Quote Management](#)
- [Quote Lifecycle](#)
- [Status Transitions](#)
- [Workflow Rules](#)