



Workflow Rules

B2B Quote Documentation

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

LAST UPDATED
2026-09-26

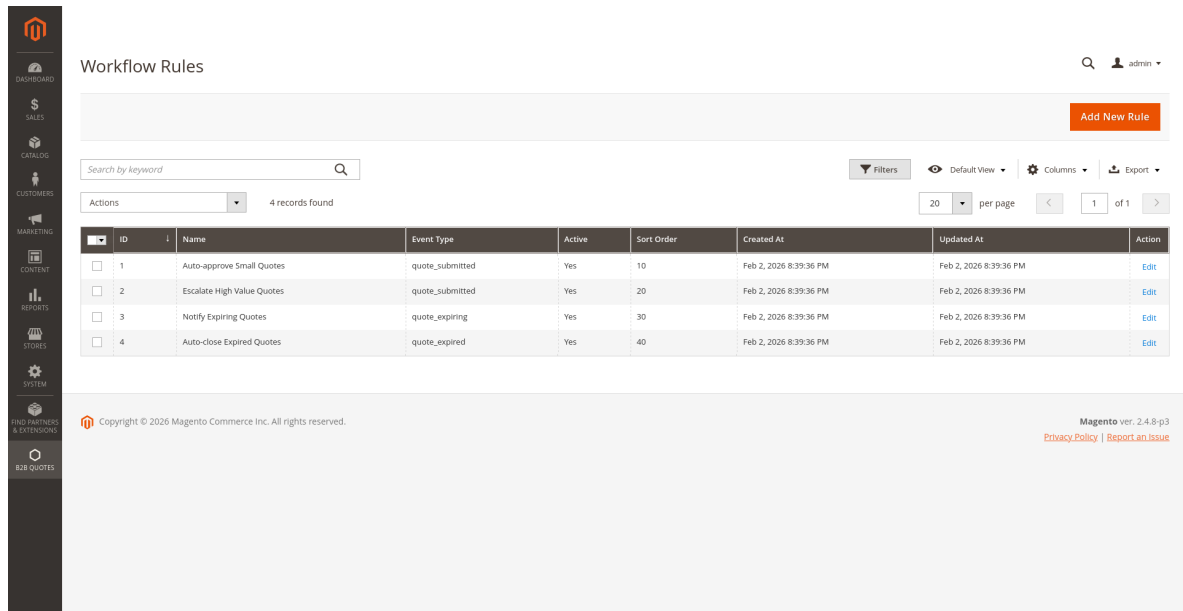
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Workflow Rules

Workflow rules automate a response to a quote event. A rule can update the quote, notify people, add an internal record, or combine several actions when its conditions match.

Open **B2B Quotes > Workflow Rules**.



ID	Name	Event Type	Active	Sort Order	Created At	Updated At	Action
1	Auto-approve Small Quotes	quote_submitted	Yes	10	Feb 2, 2026 8:39:36 PM	Feb 2, 2026 8:39:36 PM	Edit
2	Escalate High Value Quotes	quote_submitted	Yes	20	Feb 2, 2026 8:39:36 PM	Feb 2, 2026 8:39:36 PM	Edit
3	Notify Expiring Quotes	quote_expiring	Yes	30	Feb 2, 2026 8:39:36 PM	Feb 2, 2026 8:39:36 PM	Edit
4	Auto-close Expired Quotes	quote_expired	Yes	40	Feb 2, 2026 8:39:36 PM	Feb 2, 2026 8:39:36 PM	Edit

Events that can start a rule

Choose one event for each rule:

- Quote Created
- Quote Submitted
- Quote Approved
- Quote Rejected
- Quote Expiring Soon
- Quote Expired
- Quote Converted to Order
- Price Negotiated
- Counter Offer Received
- Status Changed
- Message Added

An event only starts evaluation. The rule's conditions still decide whether its actions run.

Conditions

Conditions can inspect:

- quote amounts, item count, quantity, dates, customer, and project;

- current status, underlying state, and status capabilities;
- days until expiry;
- billing and shipping country, region, city, postcode, and telephone;
- quoted item SKU, name, quantity, price, row total, and product ID.

Combine conditions with **all** or **any** logic. Keep the tree readable; several small rules are often easier to audit than one rule with many unrelated branches.

Actions

A matching rule can:

- change the quote status;
- send an email template;
- apply a discount amount;
- set or clear a configured quote fee;
- set, extend, or clear the expiration date;
- add or remove a tag;
- add an administrator or customer note.

Actions run in their configured order. If one action changes data used by another action, test the complete sequence rather than each action in isolation.

Create a rule

1. Select **Add New Workflow Rule**.
2. Enter a descriptive name.
3. Choose the event type.
4. Leave the rule inactive while configuring it.
5. Set its sort order; lower numbers have higher priority.
6. Add the conditions.
7. Add one or more actions.
8. Save and exercise the exact event with a realistic quote.
9. Verify the quote history, status, totals, notes, tags, and email delivery before activating the rule.

Example: route a large submitted quote

A rule named **Large quote requires commercial review** could use:

- event: **Quote Submitted**;
- condition: quote subtotal is at least 10,000;
- actions: change status to **Commercial Review**, add an administrator note, and send an internal notification template.

This keeps the status change, audit note, and notification together while leaving ordinary submissions untouched.

Status transition validation

Customer and administrator actions are checked against the configured **Status Transitions**. Workflow actions can also be required to follow that transition map through the **Transition Validation** setting.

Enable validation when automation must obey the same process as a person. If it is disabled, document any rule that intentionally moves a quote outside the normal path.

Avoid automation loops

A **Status Changed** rule that changes the status again can trigger more status-based processing. Likewise, a **Message Added** rule that adds a customer note can create an unexpected chain.

To keep rules predictable:

- add a condition for the exact source state or status;
- choose a target that cannot immediately satisfy the same rule again;
- do not duplicate the same side effect in several rules;
- test with logging and email capture enabled;
- review quote history after the test, not only the final status.

Troubleshooting

If a rule does not run, verify the selected event, active flag, condition values at the moment of the event, and sort order. If a status action fails, inspect transition validation and the matching actor transition. For email actions, verify that the selected Magento email template is valid and that email delivery works independently of the rule.

Related pages

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