



Agreements & Call-Offs

B2B Quote Documentation

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

LAST UPDATED
2026-10-13

SOURCE
[Open this article online](#)

EXTENSION
[Magento 2 Extension B2B Quote](#)

Agreements & Call-Offs

Agreements turn approved quote conditions into reusable purchasing arrangements. Customers can start later quote drafts with the agreed products and prices instead of rebuilding the request from scratch.

When To Use Agreements

Use agreements when a quote represents a negotiated framework instead of a one-time purchase.

Typical examples:

- annual purchasing agreements
- blanket orders with fixed item prices
- project-specific quantity commitments
- staged deliveries from one negotiated offer

Agreement Lifecycle

Approved Quote → Agreement → Call-Off Quote → Order

An agreement can be created from a customer quote when the quote has a workflow state that is eligible for conversion:

Quote State	Agreement Creation
Approved	Allowed
Accepted	Allowed
Ordered	Allowed
Draft / Submitted / Review	Not allowed
Rejected / Cancelled / Expired	Not allowed

The quote must belong to a customer and contain items. Guest quotes and empty quotes cannot be converted into agreements.

Agreement Statuses

Status	Meaning
active	Available for call-off ordering

Status	Meaning
inactive	Kept for reference, but not available for call-offs
exhausted	Quantities are fully consumed
expired	Validity date has passed or the agreement was closed by date

Only active agreements can start a call-off quote.

Agreement Data

Each agreement stores:

- agreement number
- name
- customer
- optional project
- source quote
- store scope
- validity dates
- notes

Each agreement item stores:

- product, SKU, and name
- agreed quantity
- consumed quantity
- agreed price
- optional item validity dates
- notes

Customer Workflow

Customers can open **My Agreements** in their account area.

Customers can also create an agreement themselves from one of their own quotes once that quote has reached an eligible state (approved, accepted or ordered — see the lifecycle table above). The action is offered on the customer's quote view; the extension checks that the quote belongs to the signed-in customer before converting it.

From the agreement detail page they can:

1. review agreement metadata
2. see agreed, consumed, and available quantities
3. enter call-off quantities
4. start a new draft quote from the selected quantities

The new quote is saved as a draft so the customer can review it before submission. It stores the agreement ID on the quote, the agreement item ID on each selected line, and the agreed item price as the offered price. If the agreement belongs to a project, the draft keeps that project relation.

Quantity Rules

Call-off quantities are validated before a draft quote is created.

Rule	Behavior
no quantity entered	request is rejected
quantity above available amount	request is rejected
inactive agreement	request is rejected
valid quantity	draft quote is created

Available quantity is calculated as agreed quantity minus consumed quantity. Creating a call-off draft does not increase the consumed quantity in the base package, so the draft does not reserve any part of the agreement. The consumed quantity is synchronized automatically once an order created from the call-off quote is submitted, and it is restored again when such an order is cancelled.

Admin Workflow

Admins can manage agreements in the Magento admin under **B2B Quotes > Agreements**.

Admins can:

- create agreements manually
- convert eligible quotes into agreements
- edit agreement metadata
- add or update agreement items
- set status and validity dates
- delete agreements when no longer needed

See [Agreement Management](#) for the admin UI details.

Database Tables

Agreements use these tables:

Table	Purpose
-------	---------

Table	Purpose
<code>b2b_quote_agreement</code>	Agreement header records
<code>b2b_quote_agreement_item</code>	Agreement item quantities and prices

The base quote tables also contain agreement references:

Table	Column	Purpose
<code>b2b_quote</code>	<code>agreement_id</code>	Links a quote to the source agreement
<code>b2b_quote_item</code>	<code>agreement_item_id</code>	Links quote lines to agreement items

Related

- [Quote Lifecycle](#)
- [Cart & Order Conversion](#)
- [Projects](#)
- [Agreement Management](#)
- [Database Reference](#)