Cart and Quote-to-Order Conversion

B2B Quote Documentation

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

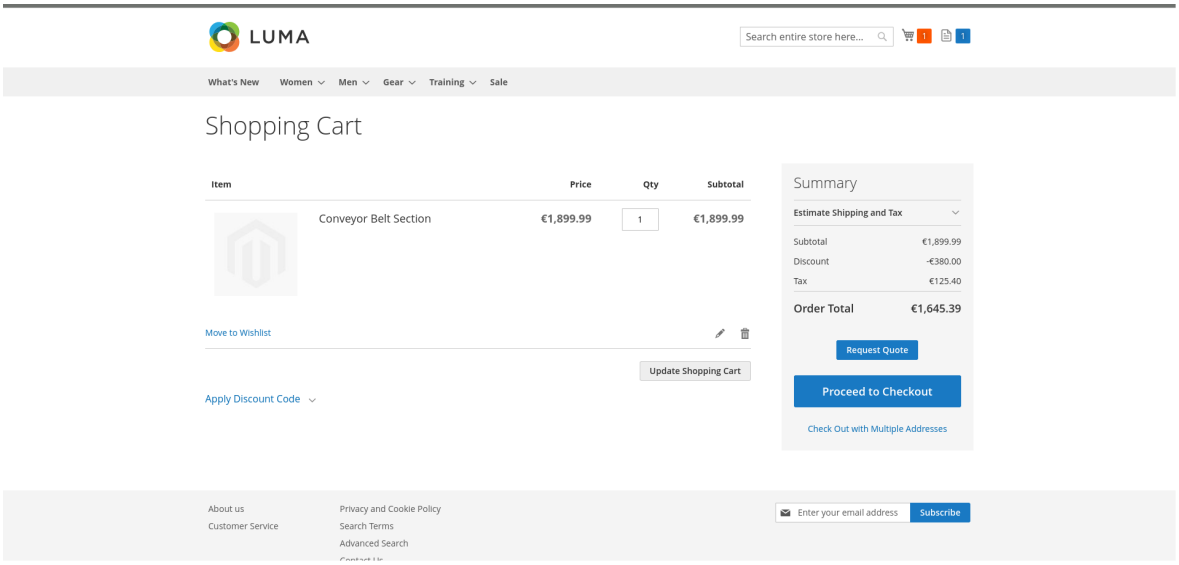
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EXTENSION
Magento 2 Extension B2B Quote

Cart and Quote-to-Order Conversion

B2B Quote connects ordinary Magento shopping with negotiated sales in both directions: a shopper can turn the cart into a quote request, and an accepted offer can either create an order directly or return its agreed items to the cart for checkout.



Cart to quote

When cart conversion is enabled, the storefront shows a configurable request-a-quote action. The extension copies eligible cart items into a B2B quote and redirects the shopper to continue the request.

Relevant settings under **Frontend Settings** are:

- **Enable Cart to Quote Conversion**;
- **Minimum Cart Amount**;
- **Cart Conversion Button Text**.

The flow supports logged-in customers and, when enabled, guests. A guest flow creates or reuses a token-scoped draft quote.

Accepting an offer

The **Accept Mode** setting provides two outcomes:

Mode	Result
Create Order Directly	Validates the quote and creates a Magento order immediately.

Mode	Result
Add to Cart	Places the accepted quote items into the customer's cart so normal checkout completes payment and ordering.

You can optionally let the customer choose between the configured modes. For add-to-cart acceptance, decide whether the existing cart should be cleared first; otherwise unrelated cart items can become part of the checkout.

Acceptance is a workflow action, not a shortcut around the quote state. The customer needs a valid transition from the current status to an accepted status. The quote must not be past its expiration date. If the administrator has already moved the quote to an accepted status, order creation can continue without applying the customer transition a second time.

Direct order validation

Before direct order creation, the extension can check:

- whether quoted products still exist and are enabled;
- stock availability and the configured out-of-stock behaviour;
- product price changes and the configured price-change behaviour;
- addresses, shipping method, and payment method;
- quote expiration and the permitted transition into the accepted state.

If direct creation fails, the acceptance transaction restores the previous quote status rather than leaving a partially accepted record.

Price policy

The order-creation settings define what happens when the catalogue price has changed since the quote was prepared:

Policy	Behaviour
Use quoted price	Keeps the negotiated item price after the configured checks pass.
Use current price	Rebuilds the Magento cart line with the current product price.
Block on change	Stops conversion and reports the changed product.

The exact labels can vary with the admin translation, but the decision is made for each product before Magento creates the order. A negotiated offered price is not the same as a free-text note. If the quote contains an offered price, review the selected policy before accepting it.

Stock and product policy

The conversion checks the configured stock behaviour and can block a missing or unavailable product. It also verifies that every quoted product still exists and is enabled. Backorders, multi-source inventory (MSI) reservations, and stock validation are Magento store rules plus the B2B Quote order-creation policy. Test the actual product types used by the store rather than assuming that a successful draft can always become an order.

Transaction boundary

The quote row is locked while acceptance is processed. Direct order creation and add-to-cart conversion run inside a transaction. A failed product, shipping, payment, price, stock, or transition validation rolls back the conversion. If acceptance had changed the status first, the previous status is restored. Check for an existing order or cart change before retrying a request.

Add-to-cart mode returns the affected cart items, not an order number. The quote remains the source commercial record, while Magento checkout performs the final payment and order steps.

Configuration checklist

Under **General Settings**:

- Accept Mode
- Allow Customer to Choose Accept Mode
- Clear Cart After Conversion
- Clear Cart Before Accepting into Cart

Under **Order Creation Settings**:

- Price Change Behaviour
- Stock Validation Behaviour
- Check Product Availability

Shipping and payment restrictions are configured in their own B2B Quote sections.

Test before launch

1. Convert an ordinary customer cart containing several product types.
2. Repeat as a guest if guest quotes are enabled.
3. Accept an approved offer in both supported modes.
4. Test with an existing non-empty cart.
5. Change a product price after quote approval and verify the selected policy.
6. Make an item unavailable and verify stock and availability behaviour.
7. Test a shipping method that later becomes disallowed.
8. Test an expired quote and a quote without a valid acceptance transition.

9. Verify order items, negotiated prices, tax, shipping, quote fee, customer/guest data, and the final quote state.

Record the expected quote state and cart contents before each acceptance test. For the failure cases, also verify that no duplicate order, partial cart, or incorrect accepted status remains after the error.

Troubleshooting

If cart conversion is missing, check the feature switch, minimum amount, customer/guest eligibility, and theme block placement. If acceptance reports **Transition not allowed**, add the appropriate customer transition from the current status to an accepted-state status. For direct-order failures, resolve the specific product, price, stock, address, shipping, or payment validation instead of bypassing it.

Related pages

- Order to Quote
- Address, Shipping and Payment
- Shipping in Quotes
- Quote Lifecycle