Price Negotiation

B2B Quote Documentation

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

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Price Negotiation

Price negotiation keeps the requested catalogue price, the merchant's offered price, customer notes, messages, and counter offers together on one quote. Both sides can see what is being discussed without moving the commercial record into an email thread.

A typical negotiation

1. The customer adds products and requested quantities to a draft.
2. The customer explains delivery, specification, or pricing requirements and submits the quote.
3. Sales reviews each line and enters an offered price where the catalogue price should change.
4. Sales adds an explanation or supporting attachment and approves the offer.
5. The customer accepts the offer or sends a counter offer when that action is enabled for the current quote.
6. After agreement, acceptance creates an order directly or returns the agreed items to the cart, depending on configuration.

The offered unit price is the effective negotiated price. Quote totals and discounts are recalculated from it.

Merchant pricing options

An administrator can price individual quote items directly and can use discounts, quote fees, shipping amounts, or automated pricing rules where appropriate. Keep each adjustment understandable: the customer should be able to reconcile line prices and totals without knowing Magento's internal calculations.

Pricing Rules are useful for consistent policies. Direct item pricing is better for a one-off negotiation that depends on context a rule cannot express.

Customer counter offers

Counter offers depend on three things:

- negotiation is enabled under **Pricing Settings**;
- customer counter offers are enabled under **Frontend Settings**;
- the quote's current state and available action allow a counter offer.

When a customer sends one, the merchant can review the proposed item pricing, respond through the quote, and release a revised offer. Configure the counter-offer email template if both teams rely on email alerts.

Visibility and communication

The **Show Prices** setting controls whether prices appear in customer quote views and customer PDFs. Messages work well for commercial explanations; attachments are better for specifications, drawings, or terms that need to stay with the quote.

Revision tracking provides the audit trail for price and item changes. Check the history when two people remember an earlier offer differently.

Operating advice

- Use offered prices consistently instead of hiding concessions in free-text notes.
- Explain material changes in a message that the customer can see.
- Add an expiration date before releasing time-sensitive pricing.
- Review tax, shipping, fees, and the grand total, not only the unit price.
- Test the complete acceptance path after changing price, stock, shipping, or payment settings.

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