B2B Quote Documentation

PDF Manual

MODULE

b2b-quote

LAST UPDATED

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Quote Lifecycle

B2B Quote Documentation · /b2b-quote/features/quote-lifecycle

Understanding the complete quote workflow from request to order.

Lifecycle Overview

```
Draft → Pending → In Review → Approved → Accepted → Ordered
```

State vs. Status

The lifecycle is usually implemented as a **state** machine (system-driven). In parallel, you can configure **statuses** for your business workflow and UI.

See:

- Status Configuration
- Status Transitions

Status Stages

1. Draft

Description: Customer is building the quote

Aspect	Details
Created By	Customer from cart or product page
Actions Available	Add/remove items, edit quantities, add notes
Visible To	Customer only
Transitions To	Submit

2. Submitted

Description: Quote submitted and waiting for admin review (often shown as "pending")

Aspect	Details
Triggered By	Customer clicks "Submit Quote"
Actions Available	Admin can review, price, respond
Visible To	Customer and Admin
Transitions To	Review, Rejected

3. Under Review

Description: Admin is evaluating the quote

Aspect	Details
Triggered By	Admin opens quote for review
Actions Available	Set prices, add discounts, message customer
Visible To	Customer and Admin
Transitions To	Approved, Rejected, Needs Info

4. Approved

Description: Admin has set final pricing

Aspect	Details
Triggered By	Admin approves quote with pricing
Actions Available	Customer can accept or counter-offer
Visible To	Customer and Admin
Transitions To	Accepted, Counter-offer, Expired

5. Accepted

Description: Customer accepts the quoted prices

Aspect	Details
Triggered By	Customer accepts quote
Actions Available	Convert to order
Visible To	Customer and Admin
Transitions To	Ordered

6. Ordered

Description: Quote converted to order

Aspect	Details
Triggered By	Customer completes checkout
Actions Available	View order, view quote history
Visible To	Customer and Admin
Transitions To	- (Final state)

Additional Statuses

Rejected

Quote declined by admin with reason.

Expired

Quote validity period ended without action.

Cancelled

Quote cancelled by customer/admin.

Counter-Offer

Customer proposed different pricing.

Needs Information

Admin requested additional details.

Status Configuration

Admins can customize statuses:

1. Go to **Sales > B2B Quotes > Quote Statuses**
2. Add, edit, or disable statuses
3. Configure status colors and behaviors

See Status Configuration for details.

Workflow Automation

Automate status transitions with workflow rules:

- Auto-assign to admin on submit
- Auto-approve quotes under threshold
- Auto-expire after validity period
- Send notifications on status change

See Workflow Rules for configuration.

Related

- Price Negotiation
- Guest Quotes
- Revision Tracking
- Merge & Split
- Status Configuration
- Workflow Rules