Quote Lifecycle

B2B Quote Documentation

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

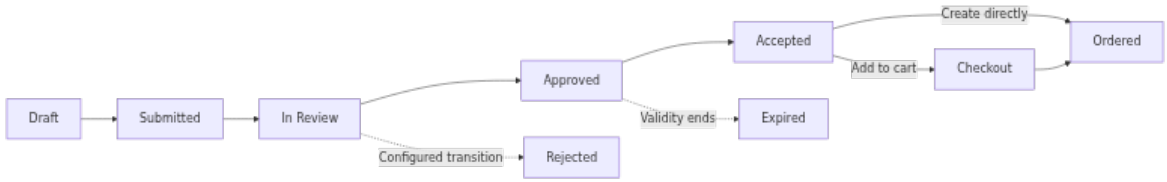
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EXTENSION
Magento 2 Extension B2B Quote

Quote Lifecycle

A quote normally moves from a customer draft to a submitted request, a reviewed offer, customer acceptance, and finally an order. SoftwareSilo B2B Quote separates the fixed lifecycle **state** from the business-facing **status**, so teams can use helpful labels without changing how the extension behaves.



Fixed quote states

State	What happens here
Draft	The request is still being prepared. Items, quantities, notes, and addresses can be completed before submission.
Submitted	The customer has sent the request to the merchant.
In Review	The merchant and customer can work through product, pricing, delivery, and message details.
Approved	The merchant has released an offer for the customer.
Accepted	The customer has accepted the offer. Depending on configuration, this creates an order directly or puts the agreed items into the cart.
Ordered	The quote has been converted into a Magento order.
Rejected	The current offer was declined. A configured transition can still allow the workflow to continue.
Expired	The validity period ended.
Cancelled	The quote was cancelled.

`Ordered`, `Expired`, and `Cancelled` are final states.

States and statuses are different

States are fixed because application logic depends on them. Statuses are configurable, store-scoped labels assigned to a state.

For example, a merchant can create **Commercial Review** and **Technical Review** as two statuses under the fixed **In Review** state. People see the precise next step, while the extension still knows that both quotes are in review.

See Quote Statuses and Status Transitions.

A practical request-to-order flow

1. The customer creates a draft from product pages, the cart, an earlier order, or an agreement call-off.
2. The customer completes the request and submits it.
3. Sales reviews availability, requested quantities, addresses, shipping, messages, and attachments.
4. Sales sets offered prices, discounts, fees, and expiration, then approves the offer.
5. The customer accepts, sends a counter offer, or follows another configured transition.
6. Acceptance either creates an order directly or moves the agreed items into the cart for normal checkout.
7. The quote retains its messages, attachments, and revision history as the record of the negotiation.

Guest requests follow the same commercial idea but use a secure access token instead of a customer account. Agreements can turn an eligible customer quote into a reusable purchasing arrangement with later call-offs.

Designing your status map

Start with the shortest process that reflects how sales actually works. Add statuses only where they communicate a distinct responsibility or next action. For every status, decide:

- who may move into and out of it;
- whether a note is required;
- who receives a notification;
- what the next valid statuses are;
- whether automation should follow the same transitions as people.

Do not use a new status merely as a reporting tag. Categories and tags are better for classification that does not change workflow.

Related

- Quote workflow from draft to order
- Price Negotiation
- Cart and Quote-to-Order Conversion
- Guest Quotes
- Revision Tracking
- Agreements and Call-Offs
- Workflow Rules