Revision Tracking

B2B Quote Documentation

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

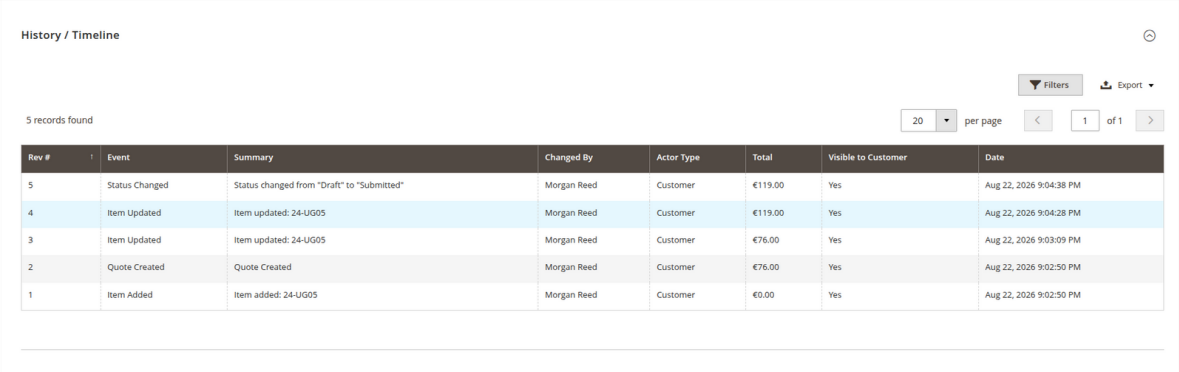
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EXTENSION
Magento 2 Extension B2B Quote

Revision Tracking

Revision tracking stores snapshots of a quote at selected business events. It gives administrators a timeline of how the offer changed instead of showing only its latest totals and items.



Events you can track

The configuration can create revisions for:

- quote creation, submission, approval, rejection, acceptance, and expiration;
- general status changes;
- item additions, updates, removals, and grouped item modifications;
- pricing updates, customer counter-offers, administrator offers, and applied discounts;
- messages, address changes, and shipping changes;
- order creation;
- rollback, merge, and split operations.

Choose events that matter to your audit and support process. Enabling every event produces the richest history but also increases storage and can add noise during an active negotiation.

What a revision preserves

A revision records quote-level commercial data and snapshots of the associated items at that point in time. The timeline can therefore show not only that an event occurred, but what the offer contained when it occurred.

Revision history complements messages and status guidance; it does not replace them. A numeric change can be visible in a snapshot while the reason for it belongs in a note or message.

Safe rollback

An administrator can restore an editable quote from a selected revision when the rollback action is permitted. The operation writes the quote and its items as one transaction, then

records the rollback as a new revision. It does not silently restore a deleted product or bypass the current quote permissions.

If saving the rollback revision fails, the current quote and its items remain unchanged. Reload the quote and history before retrying. This matters when a rollback is used to correct a mistaken offered price or item change: verify both the current totals and the new history entry after the action.

Retention

Under **Stores → Configuration → MageB2B → B2B Quote → Revision Tracking**:

- **Enabled Events** selects the events that create snapshots;
- **Enable Revision Cleanup** allows scheduled removal of old, non-current revisions;
- **Revision Retention Days** defines the retention period.

The cleanup cron preserves the current revision and avoids deleting a parent revision that is still needed by a retained child. Set retention to match your commercial and legal requirements before enabling cleanup.

See Cron Jobs for scheduler requirements.

Operational guidance

- Enable revisions before testing a workflow so the complete sequence is visible.
- Include pricing, status, item, and order events when the history is used to investigate quote-to-order differences.
- Use a longer retention period where quotations form part of a contractual or regulated record.
- Verify database growth after enabling high-frequency events such as item and message changes.
- Export or retain records outside Magento when your policy requires preservation beyond the configured cleanup period.

Troubleshooting

If a change does not appear, confirm its event is selected in the quote's store scope and that the action actually completed. If old revisions remain, check that Magento cron is running, cleanup is enabled, and the retention value is greater than zero.

Related pages

- Quote Lifecycle
- Merge and Split Quotes
- Messaging
- Cron Jobs