



SOFTWARESILOS

B2B Quote Documentation

PDF Manual

MODULE

b2b-quote

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Workflow Rules

B2B Quote Documentation · /b2b-quote/features/workflow-rules

Automate quote processing with event-driven workflow rules.

Overview

Workflow rules execute actions when specific events occur:

- Quote submitted
- Status changed
- Quote approved
- Quote expired

Rule Configuration

Sales > B2B Quotes > Workflow Rules

Create New Rule

1. Click "Add New Rule"
2. Select trigger event
3. Configure conditions
4. Define actions
5. Save rule

Rule Structure

Basic Settings

Field	Description
Name	Rule identifier
Description	Rule purpose
Status	Active/Inactive
Priority	Execution order

Trigger Events

Event	Description
quote_submitted	Customer submits new quote
quote_updated	Quote details changed
status_changed	Status transition
quote_approved	Admin approves quote
quote_accepted	Customer accepts quote
quote_expired	Validity period ended

Event	Description
message_received	New message added

Screenshot placeholder: workflow rule trigger + action selector
 File: `./_screenshots/admin-workflow-rule.png`

Conditions

Additional filters:

Condition	Example
Subtotal	<code>>= \$5000</code>
Customer Group	<code>= Wholesale</code>
Status From	<code>= Submitted</code>
Status To	<code>= Approved</code>
Item Count	<code>>= 10</code>

Actions

Action	Description
Send Email	Notification to customer/admin
Change Status	Update quote status
Assign Admin	Assign to sales rep
Add Tag	Apply tag to quote
Apply Pricing Rule	Trigger pricing calculation
Create Task	Generate follow-up task

Example Rules

Auto-Assign High-Value Quotes

Event: `quote_submitted`
 Condition: `Subtotal >= 10000`
 Action: Assign to Senior Sales Rep

Auto-Approve Small Orders

Event: `quote_submitted`
 Condition: `Subtotal < 500 AND Customer Group = Trusted`
 Action: Change status to Approved, Apply standard discount

Expiration Warning

```
Event: daily_check
Condition: Days until expiry = 3
Action: Send reminder email to customer
```

Escalation Rule

```
Event: quote_updated
Condition: Days in status >= 5 AND Status = Under Review
Action: Send escalation email to manager
```

Workflow Chains

Link multiple rules:

1. **Quote Submitted** → Auto-assign
2. **Quote Assigned** → Send notification
3. **Quote Approved** → Apply pricing
4. **Quote Accepted** → Prepare order

Email Templates

Configure notification templates:

Marketing > Email Templates

Template	Purpose
quote_new	New quote notification
quote_status_update	Status change notification
quote_approved	Approval notification
quote_expiring	Expiration warning

Logging

All workflow actions are logged:

1. Go to quote detail
2. Open "History" tab
3. View all automated actions

Best Practices

1. **Start Simple:** Begin with basic rules
2. **Test Thoroughly:** Verify with test quotes
3. **Monitor Performance:** Check rule execution times
4. **Avoid Loops:** Ensure rules don't trigger each other infinitely
5. **Document Rules:** Maintain rule documentation

Related

- [Quote Lifecycle](#)
- [Pricing Rules](#)
- [Status Configuration](#)
- [Status Transitions](#)
- [Settings Reference](#)