B2B Quotation

USER MANUAL VER. 1.0.0

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I.   Overview.

B2B quotation extension allows customers request a quote for products instead of adding them to the cart..

II.   Configuration

From admin cpanel go to menu Vendors -> Configuration. Go to Quotation section

- Login Required: this option allow you to add the restriction for the quote extension so only logged in customer can use it.
- Account Details: Here you can set the option to enable/disable fields on the quote form.

- Default Expiration Time: The quote will be expired after this days. vendor can set the expiration time when viewing the quote.
- Default Reminder Notice: After this days system will send a notification email to customer.
- Quote Prefix: the prefix of quote id
- Current Numeral Value: The current value of the quote id counter.
- Increment: Here you can set the value with which the numeral value part of the quote number should increment.
- Pad Length: Here you can specify the length of the numeral part of the quote number. If this is set 0 or is left empty then it will add leading zero's meaning it will just have the incremented value as numeral part.

- Email Sender: This email will be used to send notification emails to customer.
- New Request Template: The e-mail that is sent to customer when a new quote request is submited.
- New Proposal Template:The e-mail that is sent to customer when a new quote request is submited.
- Request Cancelled Template: The e-mail that is sent to customer when the request is cancelled.
- Request Reject Template: The e-mail that is sent to customer when the request is rejected.
- Proposal Reminder Template: The e-mail that is sent to customer when the proposal is reminded.
- Proposal Expired Template: The e-mail that is sent to customer when the proposal is expired.
- CRM Email Template: The e-mail that is sent to customer when vendor send a message.
- CRM Email Template for Vendor: The e-mail that is sent to vendor when customer send a message.
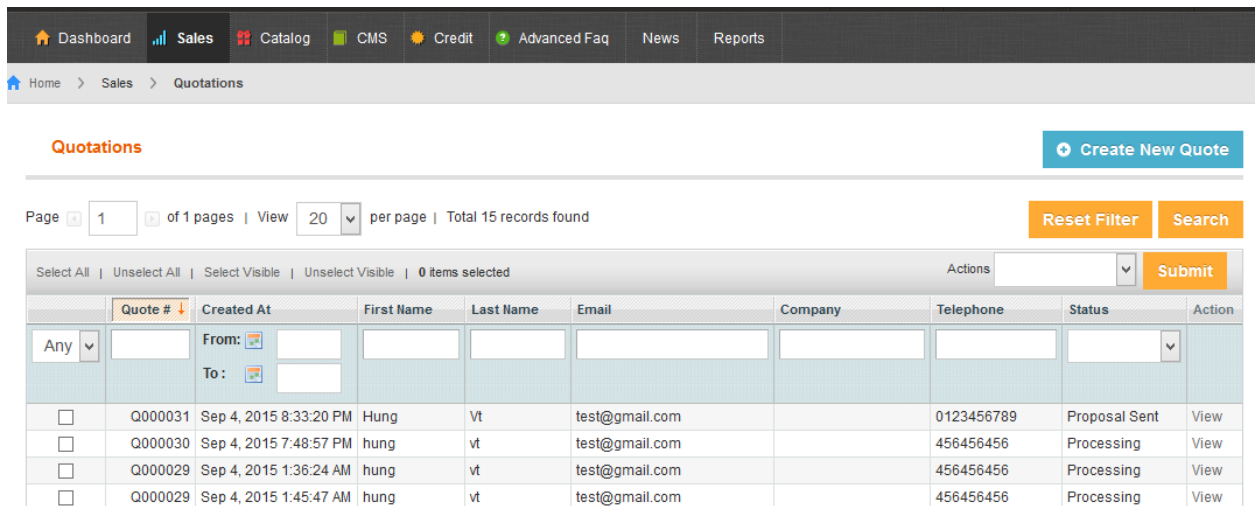
III. Vendor Cpanel.
1. Enable the "Add to Cart" and "Add to Quote" button

From vendor cpanel go to Catalog -> Product and edit a product. On product edit page vendor will see new fields that allow you to enable the "Add to Cart" and "Add to Quote" button.

2. Manage Quotes.

From vendor cpanel go to menu Sales -> Quotations.

Here vendor will see all quotes which is sent from customer.

Vendor can create new quote for a customer by clicking to "**Create New Quote**" button.

Vendor can click to a quote to view quote information.

On this page vendor will see all informtion about the quote request.

Vendor can change the status manually by change the value of the quote status dropdown field then click to Save button.

Vendor can send message to customer. The message will be sent to customer email if vendor check to the *Notify customer by email* checkbox.

Vendor can add multiple proposals to an item by clicking to the "**Add**" link.

After vendor enter the proposal he can click to the save button to save a proposal or click to "**Save All**" link to save all proposals.

Vendor can click to the remove icon to remove the proposal.

Vendor can remove the item from quote by clicking to remove button that the end of each row item.
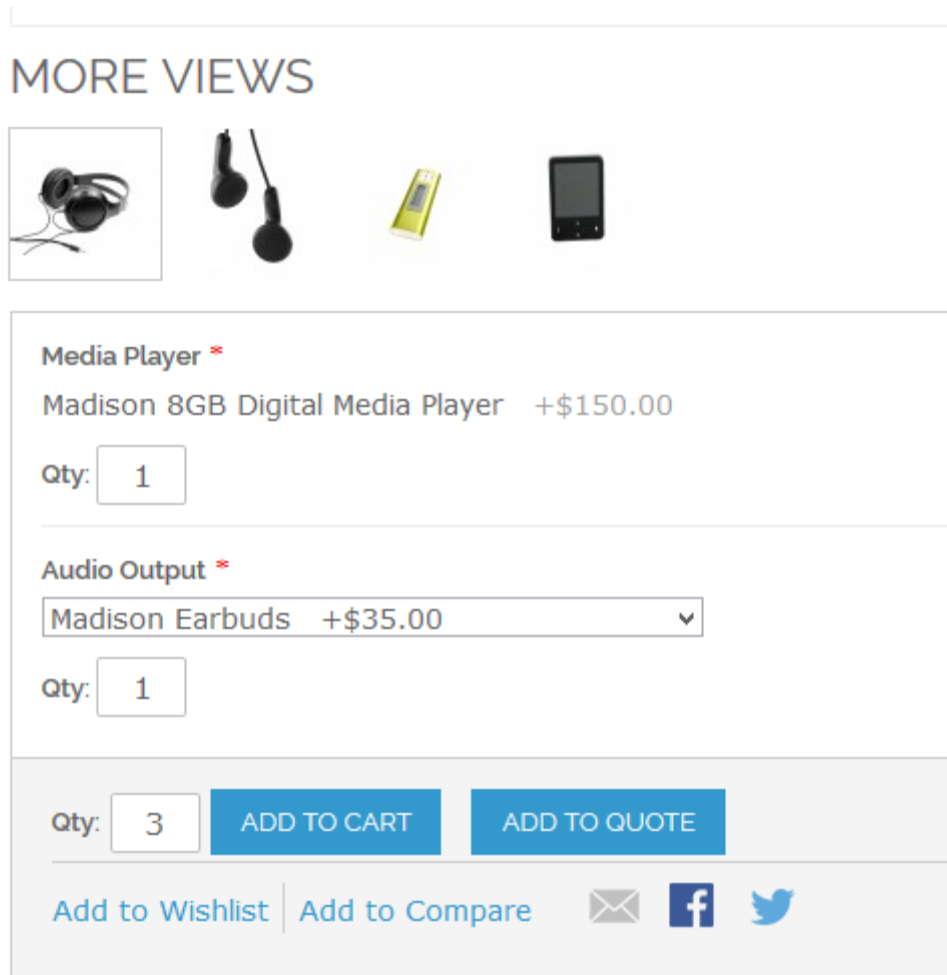
Vendor Can add new item to the quote by clicking to the "**Add Products**" button.

Select products which you want to add to quote and click to "**Add Selected Product(s) to Quote**" button.

IV.   Frontend

If a product is enabled for adding to quote customer will see the "**Add to Quote**" button.

After select all product options and enter qty let click to the "Add To Quote" button to add the product to quote.

Customer will be redirected to quote list page. Customer can continue adding other products to quote or enter customer information and comment to quote and each item then submit the quote request to vendor.

After customer click to "Submit Quote Request" button he will get the success page with the link to access to quote.

When customer visit to the quote link he will get the page with the quote information.

QUOTE REQUEST #Q000033

QUOTE REQUEST DATE: SEPTEMBER 6, 2015

CUSTOMER INFORMATION

Customer Name	Hung vt
Email	youremail@domain.com
Telephone	123123123
Company	

REMARK WITH PROPOSAL

This is the comment for the quote

Quote status: Processing

All items which you have added to quote

Quote status: Processing

PRODUCT	REMARKS	ORIGINAL PRICE	QTY	PROPOSAL
MP3 PLAYER WITH AUDIO SKU: vendor01_hdeo14 *Media Player:* 1 x Madison 8GB Digital Media Player $150.00 *Audio Output:* 1 x Madison Earbuds $35.00	This is the comment for the MP3 Player.	$185.00	3	in process...
8GB MEMORY CARD SKU: vendor01_hdeo05		$20.00	1	in process...

Customer can also send messages to vendor from this page

MESSAGE HISTORY

SEND

Sep 04, 2015 08:45:43 PM| by **Vnecoms Test Store**

Hi,
This is the message from vendor send to customer

Sep 04, 2015 08:44:14 PM| by **Hung Vt**

Hi,
This is the message from customer send to vendor.

One vendor review the quote and submit the proposal customer will get the quote with new 2 button to confirm or reject the proposal.

PRODUCT	REMARKS	ORIGINAL PRICE	QTY	PROPOSAL
16GB MEMORY CARD SKU: vendor01_hde004	This is the comment that customer leaves for the item	$30.00	1 10 20	○ $30.00 ◉ $28.00 ○ $25.00
ANN ANKLE BOOT SKU: vendor01_aws005c *Color:* Black *Shoe size:* 7		$470.00	1	◉ $450.00

REJECT PROPOSAL   CONFIRM AND ADD TO CART

MESSAGE HISTORY

If customer click to "Confirm and Add to Cart" button all items in the quote will be added to shopping cart with qty and price from proposal.

SHOPPING CART

PRODUCT		PRICE	QTY	SUBTOTAL	
	16GB MEMORY CARD *SKU: vendor01_hde004*	$28.00	10 Edit	$280.00	🗑
	ANN ANKLE BOOT *SKU: vendor03_aws006* *Color:* Black *Shoe size:* 7	$450.00	1 Edit	$450.00	🗑

EMPTY CART   UPDATE SHOPPING CART -OR- CONTINUE SHOPPING

Customer will not be able to edit, change qty of items which are added from quote.

Item **16GB Memory Card** - $28.00 is not allowed to update qty.

Item **Ann Ankle Boot** - $450.00 is not allowed to update qty.

PRODUCT		PRICE	QTY
	16GB MEMORY CARD *SKU: vendor01_hde004*	$28.00	10 Edit

V.   Support.

If you need support or have questions directly related to Marketpace extension, please use our Online Message Form to contact our support team or send us an email at: support@vnecoms.com.

Best Regards,
VnEcoms Team