

# **B2B Quotation**

**USER MANUAL VER. 1.0.0**

## Table of Contents

<b>I. Overview.....</b>	<b>3</b>
<b>II. Configuration.....</b>	<b>3</b>
<b>III. Vendor Cpanel.....</b>	<b>6</b>
<b>1. Enable the "Add to Cart" and "Add to Quote" button.....</b>	<b>6</b>
<b>2. Manage Quotes.....</b>	<b>6</b>
<b>IV. Frontend.....</b>	<b>10</b>
<b>V. Support.....</b>	<b>15</b>

## 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

Quote Frontend		
Login Required	<input type="text" value="No"/>	[WEBSITE]
	<small>▲ Require customer login to submit a quote</small>	
Account Details		
Email Address	Yes and Required	[STORE VIEW]
First Name	Yes and Required	[STORE VIEW]
Last Name	Yes and Required	[STORE VIEW]
Telephone	<input type="text" value="Yes and Required"/>	[STORE VIEW]
Company	<input type="text" value="Yes"/>	[STORE VIEW]
VAT/Tax Id	<input type="text" value="No"/>	[STORE VIEW]

- 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.

Quote Configuration	
Expiration Times and Notifications	
Default Expiration Time	<input type="text" value="60"/> ? [STORE VIEW] ▲ In days
Default Reminder Notice	<input type="text" value="3"/> ? [STORE VIEW] ▲ In days. Set to "0" to disable this feature
Quote Id Format	
Quote Prefix	<input type="text" value="Q"/> ? [STORE VIEW]
Current Numeral Value	<input type="text" value="33"/> ? [GLOBAL]
Increment	<input type="text" value="1"/> ? [STORE VIEW]
Pad Length	<input type="text" value="6"/> ? [STORE VIEW]

- **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.

Quote Emails	
<b>Sales Representatives</b>	
Email Sender	General Contact <input type="button" value="v"/> ? [STORE VIEW]
<b>Email Templates</b>	
New Request Template	New Quote Request (Default Template from Local) <input type="button" value="v"/> ? [STORE VIEW]
New Proposal Template	New proposal (Default Template from Locale) <input type="button" value="v"/> ? [STORE VIEW]
Request Cancelled Template	Cancel Quote Request (Default Template from Local) <input type="button" value="v"/> ? [STORE VIEW]
Request Reject Template	Reject proposal (Default Template from Locale) <input type="button" value="v"/> ? [STORE VIEW]
Proposal Reminder Template	Proposal Reminder (Default Template from Local) <input type="button" value="v"/> ? [STORE VIEW]
Proposal Expired Template	Proposal Expired (Default Template from Local) <input type="button" value="v"/> ? [STORE VIEW]
CRM Email Template	CRM Email Template - Customer (Default Template) <input type="button" value="v"/> ? [STORE VIEW]
CRM Email Template for Vendor	CRM Email Template - Vendor (Default Template) <input type="button" value="v"/> ? [STORE VIEW]

- 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 submitted.
- New Proposal Template: The e-mail that is sent to customer when a new quote request is submitted.
- 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.

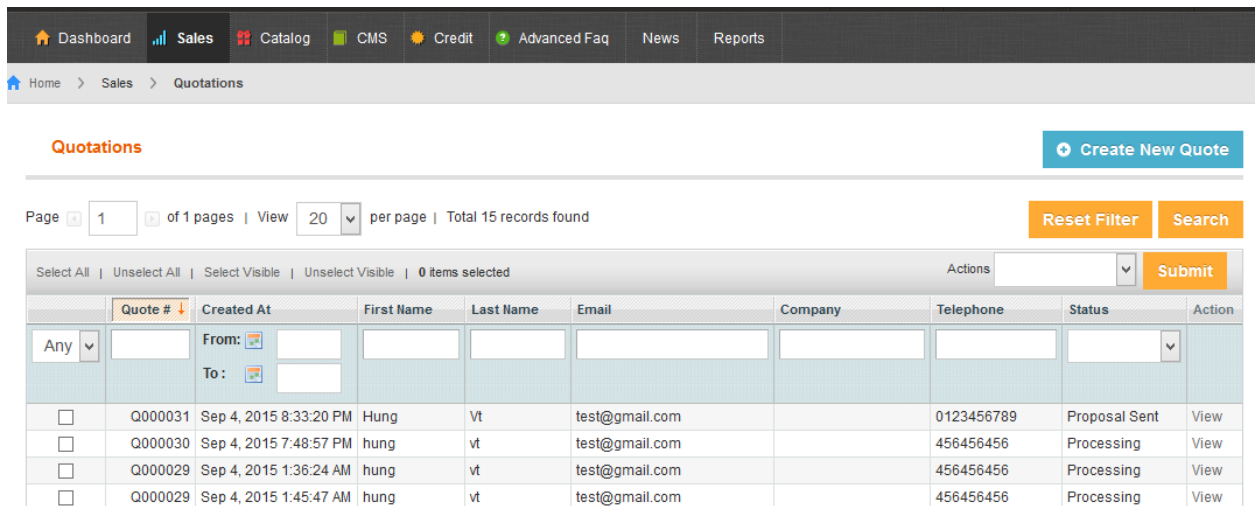
#### 1. Enable the "Add to Cart" and "Add to Quote" button

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.

Allow to Quote Mode	Yes
Allow to Order Mode	Yes

#### 2. Manage Quotes.

From vendor cpanel go to menu Sales -> Quotations.



Quotations Create New Quote

Page 1 of 1 pages | View 20 per page | Total 15 records found Reset Filter Search

Select All | Unselect All | Select Visible | Unselect Visible | 0 items selected Actions Submit

	Quote #	Created At	First Name	Last Name	Email	Company	Telephone	Status	Action
Any		From: <input type="text"/> To: <input type="text"/>							
<input type="checkbox"/>	Q000031	Sep 4, 2015 8:33:20 PM	Hung	Vt	test@gmail.com		0123456789	Proposal Sent	View
<input type="checkbox"/>	Q000030	Sep 4, 2015 7:48:57 PM	hung	vt	test@gmail.com		456456456	Processing	View
<input type="checkbox"/>	Q000029	Sep 4, 2015 1:36:24 AM	hung	vt	test@gmail.com		456456456	Processing	View
<input type="checkbox"/>	Q000029	Sep 4, 2015 1:45:47 AM	hung	vt	test@gmail.com		456456456	Processing	View

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.

**Vendor view quote**

Quote Request #Q000031 | Friday, September 4, 2015

Back Cancel Quote Hold Save Quote Submit Proposal

**Quote View**

Quote Request

**Customer Information**

Customer Name: Hung Vt  
 Email: test@gmail.com  
 Telephone: 0123456789  
 Company:

**Quotation Management**

Last Update: September 4, 2015  
 Quote Request Status: Processing  
 Expiry Date: 11/04/2015  
 Reminder Date: 09/08/2015  
 Customer Comment: This is the comment that customer leaves for the quote  
 Note: (Not visible for customers)

**Message History**

Vendor can send messages to customer here

Notify Customer by Email

Sep 04, 2015 08:45:43 PM | by Vnecoms Test Store  
 Customer Notified  
 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.




**Vendor can add multiple proposals for an item**

Product	Comment with product	Original Price	Qty	Price Proposal	Margin (GP)
16GB Memory Card SKU: vendor01_hde004	This is the comment that customer leaves for the item	\$30.00	1	<input checked="" type="radio"/> 30	0%
			10	<input type="radio"/> 28	-7%
			20	<input type="radio"/> 25	-17%
				<input type="radio"/> 30	0%
Ann Ankle Boot SKU: vendor01_aws005c Color: Black Shoe size: 7		\$470.00	1	<input checked="" type="radio"/> 470	0%


Add Products

On this page vendor will see all information 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.

Quotation Management	
Last Update	September 4, 2015
Quote Request Status	Proposal Sent 
Expiry Date	11/04/2015 
Reminder Date	09/08/2015 
Customer Comment	This is the comment that

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

Message History	
<div style="border: 1px solid #ccc; height: 80px; width: 100%;"></div>	
<input type="checkbox"/> Notify Customer by Email	
<hr/>	
<input type="checkbox"/> Sep 04, 2015 08:45:43 PM   by Vnecoms Test Store	
Customer <b>Notified</b>	
Hi, This is the message from vendor send to customer	
<hr/>	
<input type="checkbox"/> Sep 04, 2015 08:44:14 PM   by Hung Vt	
Hi, This is the message from customer send to vendor.	



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.

Original Price	Qty	Price Proposal	Margin (GP)
\$30.00	1	<input type="radio"/> 30 <input type="button" value="x"/>	0%
	10	<input checked="" type="radio"/> 28 <input type="button" value="x"/>	-7%
	20	<input type="radio"/> 25 <input type="button" value="x"/>	-17%
	<input type="text"/>	<input type="radio"/> 30 <input type="button" value="x"/> <input type="button" value="Add"/>	0%
	<input type="text"/>	<input type="radio"/> 30 <input type="button" value="x"/> <input type="button" value="Add"/>	0%
		<input type="button" value="Add"/> <input type="button" value="Save All"/>	

Vendor can remove the item from quote by clicking to remove button that the end of each row item.

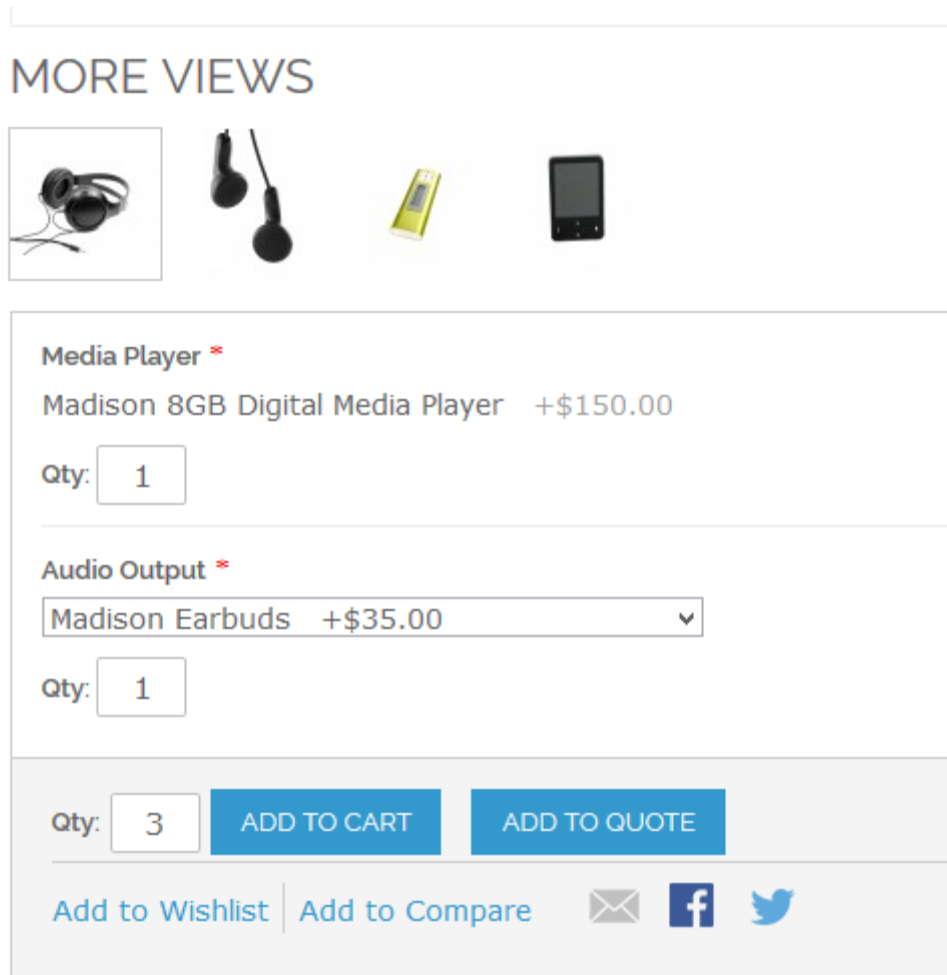
Vendor Can add new item to the quote by clicking to the "Add Products" button.

ID	Product Name	SKU	Price	Select	Qty To Add
446	MP3 Player with Audio	Configure vendor01_hde014	\$185.00	<input checked="" type="checkbox"/>	3
445	Camera Travel Set	Configure vendor01_hde009		<input type="checkbox"/>	
442	5-Year Warranty	Configure vendor01_hde008	\$100.00	<input type="checkbox"/>	
441	3-Year Warranty	Configure vendor01_hde007	\$75.00	<input type="checkbox"/>	

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.



MORE VIEWS

Media Player \*

Madison 8GB Digital Media Player +\$150.00




Qty:

Audio Output \*

Madison Earbuds +\$35.00

Qty:



Qty:  [ADD TO CART](#) [ADD TO QUOTE](#)

[Add to Wishlist](#) | [Add to Compare](#)   

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.

VNECOMS TEST STORE

PRODUCT	REMARKS	PRICE	QTY	
 <p><b>MP3 PLAYER WITH AUDIO</b> SKU: vendor01_hde014</p> <p><i>Media Player:</i> 1 x Madison 8GB Digital Media Player \$150.00</p> <p><i>Audio Output:</i> 1 x Madison Earbuds \$35.00</p>	<input type="text"/>	\$185.00	<input type="text" value="3"/>	

[CONTINUE SHOPPING](#)

[SUBMIT QUOTE REQUEST](#)

**REMARKS**

Do you have a general remark with this Quote Request?

**EMAIL ADDRESS \***

**FIRST NAME \***

**LAST NAME \***

**TELEPHONE \***

**COMPANY**

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

## YOUR QUOTE REQUEST HAS BEEN RECEIVED.

**Thank you for your interest!**

Your quote request # is: **Q000033**.

You will receive a Quote Request confirmation email with a link to track progress.

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](mailto: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_hde014  <i>Media Player:</i> 1 x Madison 8GB Digital Media Player \$150.00  <i>Audio Output:</i> 1 x Madison Earbuds \$35.00	This is the comment for the MP3 Player.	\$185.00	3	in process...
	8GB MEMORY CARD SKU: vendor01_hde005		\$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 **Vnecom 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: vendoro1_hde004	This is the comment that customer leaves for the item	\$30.00	1 10 20	<input type="radio"/> \$30.00 <input checked="" type="radio"/> \$28.00 <input type="radio"/> \$25.00
	ANN ANKLE BOOT SKU: vendoro1_aws005c <i>Color: Black</i> <i>Shoe size: 7</i>		\$470.00	1	<input checked="" type="radio"/> \$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
 <p><b>16GB MEMORY CARD</b>  <i>SKU: vendor01_hde004</i></p>	\$28.00	<input type="text" value="10"/> <a href="#">Edit</a>	\$280.00 
 <p><b>ANN ANKLE BOOT</b>  <i>SKU: vendor03_aws006</i>  <i>Color: Black</i>  <i>Shoe size: 7</i></p>	\$450.00	<input type="text" value="1"/> <a href="#">Edit</a>	\$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
 <p><b>16GB MEMORY CARD</b>  <i>SKU: vendor01_hde004</i></p>	\$28.00	<input type="text" value="10"/> <a href="#">Edit</a>

**V. Support.**

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

Best Regards,  
**VnEcoms Team**