

Cart Quote 2.0

Introduction

The Cart Quote extension gives you the ability to add “Quote request” function to your Magento web store. Your web store customers can add products to their shopping cart and request a quote instead of checking out. The web store admin can edit and approve the quote. Once the quote is approved, the customer can convert their quote to an order and proceed with the checkout process.

Compatibility

- This extension is compatible with the default Magento 2.1.x Luma theme.
- This extension is compatible with Magento version 2.1.x
- This extension is compatible with following product types:
 - Simple products
 - Configurable products
 - Grouped products
 - Virtual products
 - Downloadable products
 - Bundle products

Installation

1. Download the extension package from your account and extract the downloaded archive.
2. Copy the "app" folder (and its content): "/" to the root Magento directory.
3. Positioned in the root Magento directory execute the following commands:
 - Enable: `php bin/magento module:enable Ecomwise_CartQuote`
 - Install: `php bin/magento setup:upgrade`
 - Recompile: `php bin/magento setup:di:compile`
 - Clear the Magento cache (Optional): `php bin/magento cache:clean`

Configuration

Stores -> Configuration -> Ecomwise -> Cart Quote

1. **Info & Support:** This section contains an overview of the extension information such as extension version number, tested compatibility, documentation info and support.
2. **General:**
 - Extension Enabled: Yes/No

General



Extension Enabled
[store view]

Yes



3. Cart Quote Settings:

- Enable quotes for customer groups: This option enables the extension for a particular customer group: General, Wholesale, Retailer etc.

Cart Quote Settings



Enable quotes for customer groups
[store view]

General
Wholesale
Retailer

4. E-mail Settings:

- E-mail: set the email account that will receive quote requests and send proposals.

E-Mail Settings



E-mail
[store view]

The email account that will receive quote requests and send proposals.

5. Overview Cart Quote in Admin

Sales -> Quotes -> Create New Quote

In Sales - > Quotes: existing quotes are listed.

Create New Quote: the admin can make a new quote by selecting a customer from the customer list.

The screenshot shows the Magento Admin interface. On the left is a sidebar menu with categories like Dashboard, Sales, Products, Customers, Marketing, Content, and MagePlaza. The 'Sales' section is expanded, showing options like Operations, Orders, Invoices, Shipments, Credit Memos, Billing Agreements, Transactions, and Quotes. The main content area is titled 'Quotes' and features a 'Create New Quote' button. Below this, there's a table of existing quotes. The first quote is for 'Ecomwise Extensions' with a subtotal of 129,000.00 and a status of 'Proposal'.

Email	Customer Name	Item Count	Item Quantity	Subtotal	Subtotal (Discounted)	Created	Total	Updated	Action	Status
@ecomwise.com	Ecomwise Extensions	3	3.0000	129.0000	129.0000	Dec 11, 2017 9:11:05 AM	129.0000	Dec 11, 2017 9:27:29 AM	Turn to order	Proposal

After the customer is selected, if multiple websites are present, the process continues with a question in which store the quote should be made. The customer will select the store view and the quote can be filled.

The screenshot shows the 'Items Ordered' section in the Magento Admin interface. It features a table with columns: Product, Price, Qty, Subtotal, Discount, Row Subtotal, and Action. The table is currently empty, displaying 'No ordered items'. An 'Add Products' button is located at the top right.

Product	Price	Qty	Subtotal	Discount	Row Subtotal	Action
No ordered items						

Add Products button opens a list with available products for selection.

The product(s) is/are selected and then the button Add Selected Product(s) to Order adds the products to the quote.

Please select products

Add Selected Product(s) to Order

Search

Reset Filter

16 records found

20

▼

per page

<

1

of 1

>

ID	Product	SKU	Price	Select	Quantity
	<input type="text" value="sprite"/>	<input type="text"/>	<div>From</div> <div>To</div>	<div>Any</div> <div>▼</div>	
2046	Set of Sprite Yoga Straps <div>Configure</div>	24-WG085_Group		<input type="checkbox"/>	<input type="text"/>
51	Sprite Yoga Companion Kit <div>Configure</div>	24-WG080	\$0.00	<input checked="" type="checkbox"/>	<div>1</div>

The quote at this point can be saved and the admin can then make Proposal of the quote which was saved.

The admin can also edit the the product(s) added by: price, quantity and discount.

The Update Items and Quantities button updates the product(s).

Back to Quotes

Save as Quote

Submit Order

Items Ordered

Add Products

Product	Price	Qty	Subtotal	Discount	Row Subtotal	Action
Luma Analog Watch SKU: 24-WG09	\$40.00 <input checked="" type="checkbox"/> Custom Price* <input type="text" value="35"/>	<input type="text" value="1"/>	\$40.00	\$0.00 <input checked="" type="checkbox"/> Apply	\$40.00	Please select
Layla Tee SKU: WS04-M-Green	\$29.00 <input checked="" type="checkbox"/> Custom Price* <input type="text" value="25"/> Configure	<input type="text" value="1"/>	\$29.00	\$0.00 <input checked="" type="checkbox"/> Apply	\$29.00	Please select
Sprite Yoga Companion Kit SKU: 24-WG080-24-WG081-blue-24-WG084-24-WG085-24-WG088	\$61.00	<input type="text"/>	\$61.00	\$0.00 <input checked="" type="checkbox"/> Apply	\$61.00	Please select
Total 3 product(s)	Subtotal:		\$130.00	\$0.00	\$130.00	

* - Enter custom price excluding tax

Apply Coupon Code



Update Items and Quantities

After the product(s) is/are updated the billing and shipping address are filled in.

After that the Payment and Shipping methods are chosen.

NOTE: The shipping methods must be selected while we are making the proposal. The shipping method is part of the quote.

Payment & Shipping Information

Payment Method

- ☐ Cash On Delivery
- ☐ Bank Transfer Payment
- ☐ Check / Money order

Shipping Method

Flat Rate

- ☐ Fixed - **\$5.00**

After all the details are filled out we can check the Order Totals and convert the quote to Proposal. After the Proposal is made from the admin the customer receives an email (Quote Approve Notification). The customer can now log into the account and Make an Order from the proposed quote.



Front - end

Customer can Request a quote. By requesting the quote with the selected product(s) a quote is made. The customer can then fill out the required informations and can leave a message to the administrator.

The customer will see on the front-end couple of messages indicating that the quote is created, the admin has received an email and, if the customer has not been registered yet, that a customer is created.

In the last case, the customer will receive an email where he can set up a password for his account.

Shopping Cart

Item	Price	Qty	Subtotal
 <div>Layla Tee Size: S Color: Green</div>	\$29.00	1	\$29.00
			
Compete Track Tote	\$32.00	1	\$32.00

Summary

Estimate Shipping and Tax

Subtotal

\$61.00

Tax

\$0.00

Order Total

\$61.00

First name

Ecomwise

Last name

Extensions

Email Address

extensions@ecomwise.ecom

Message

Please consider these items and give us a quote.

Request quote

Proceed to Checkout

Check Out with Multiple Addresses

Update Shopping Cart

Apply Discount Code



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A quote id #000000021 has been created.



The admin has received an email.



A customer with email extensions@ecomwise.com is created.

The customer can View Quote, the quote is with status requested and it is waiting for approval. The administrator can now review the quote and send the proposal for the quote. The customer receives email with the proposal and in the account page the customer can make an order from the quote.

Quote # 000000021

PROPOSAL

Date: 11/12/17

[« Back](#)

[Make an order](#)

Uninstall

Automated ways are not available in this version.

Release

December 2017

- Stable version release.

Support

Please browse to our [FAQ](#) page for more details or contact <http://support.b2b-extensions.com>.