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

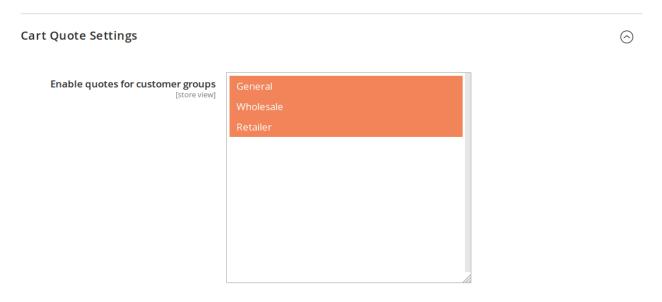
Stores -> Configuration -> Ecomwise -> Cart Quote

- 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



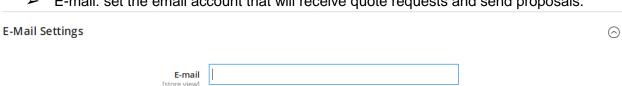
3. Cart Quote Settings:

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



4. E-mail Settings:

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



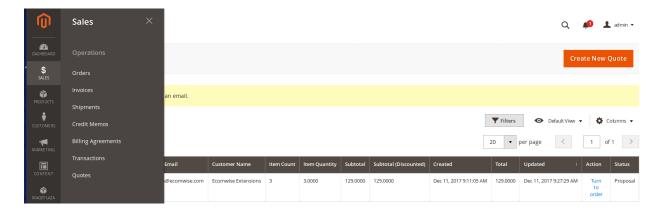
The email account that will receive quote requests and send proposals.

5. Overview Cart Quote in Admin

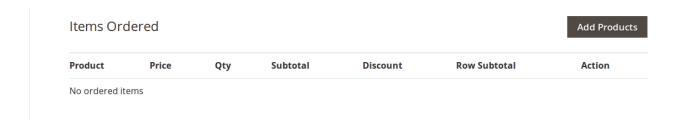
Sales -> Quotes -> Create New Quote

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.

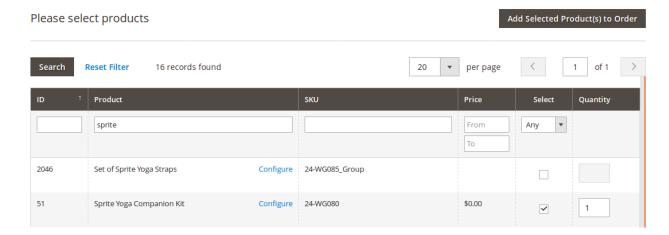


After the customer is selected, if multiple websites are present, the process continues with a question in which store the quote should be made. The customer will select the store view and the quote can be filled.



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

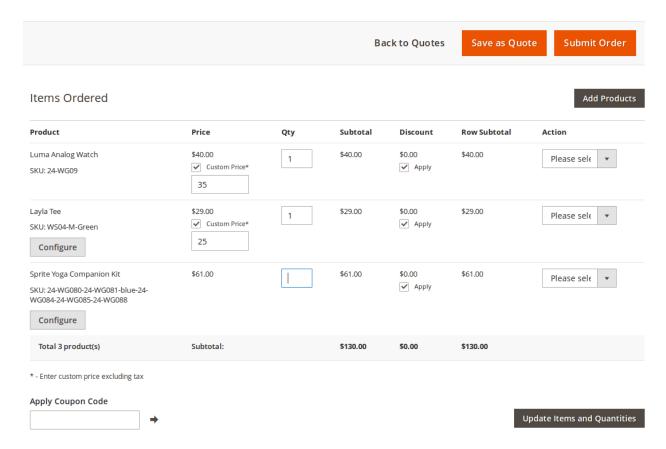
The product(s) is/are selected and then the button Add Selected Product(s) to Order adds the products to the quote.



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).



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 Method	Shipping Method
Cash On Delivery	Flat Rate
Bank Transfer Payment	O Fixed - \$5.00
○ Check / Money order	

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.

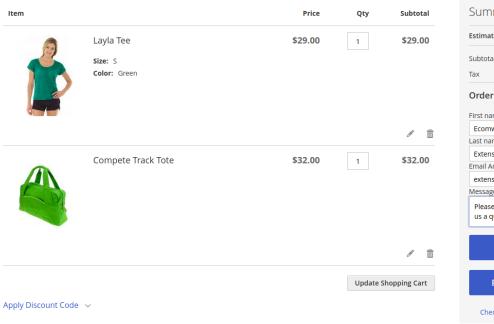
Front - end

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.

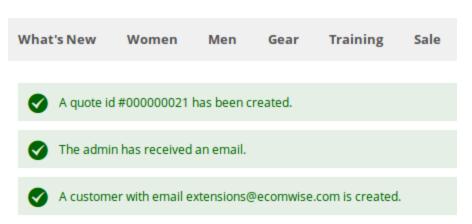
In the last case, the customer will receive an email where he can set up a password for his account.

Shopping Cart









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.



Uninstall

Automated ways are not available in this version.

Release

December 2017

Stable version release.

Support

Please browse to our $\underline{\sf FAQ}$ page for more details or contact $\underline{\sf http://support.b2b-extensions.com}$.