

Module Quotation

User Manual

V3.5.6

Summary

Summary

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Overview

Magento Quotation Module is Designed to Help Webiste owner to propose to their customer customized quotations containing products with specific prices and delivery conditions. You also can print quotation to PDF Format or simply notify customer by email. Once quotation is activated, customer can view it from customer area, print quotation or add it to cart.

De son coté, le client pourra visualiser les devis dans son espace client, les imprimer au format PDF et les ajouter au panier pour passer commande

Installation

Copy Files

Unzip the archive and open the folder "quotation_3.5.6" upload al folder and files into your web site. Once all files are uploaded, you have to refresh both magento and index caches

Once caches are refreshed, log out and login from admin panel (to reset permissions)

Magento Updates

Modules are designed to be independent of magento core so you can update magento core without problem. However, we advise you to test on test environment before upgrading production website .

Other modules compatibility

Magento architecture allows to customize class behavior using overriding. However, 2 modules can not override the same class. So if you install other modules that override the same class, you need to custom it.

To know overridden classes by Purchase Module, take a look at config.xml file, sections.

Settings


To set Quotation Module configuration, use **system > configuration > customer tab > Quotation**

Warning: if "access denied" message is displayed, you have to log out / log in to reset admin permissions.

Pdf settings

PDF Design

Header Image (585x50)



Parcourir...

[STORE VIEW]

Delete Image

PDF footer

Boostmyshop all right reserved

[STORE VIEW]

Agreement

[STORE VIEW]

Settings	Comment
PDF Header	text displayed in Quotation PDF Header
PDF Footer	text displayed in Quotation PDF Footer
Agreement	text displayed in quotation pdf

General

General		
Category for associated Product	<input type="text"/>	[STORE VIEW]
Attribute-set Id for associated Product	Computer <input type="text"/>	[STORE VIEW]
Default validity duration	30 <input type="text"/> ▲ days	[STORE VIEW]
Tax Class for quotation	default <input type="text"/>	[WEBSITE]
Display text field	No <input type="text"/>	[WEBSITE]
Manufacturer attribute	manufacturer <input type="text"/>	[WEBSITE]

Settings	Comment
Category for associated product	Enter the default categories linked to the product. Leave empty for all
Attribut set id for associated prodcuct	Select the default attribute for product. Leave empty for all
Default validity duration	Enter the number of day to set a quote "active"
Tax class for quotation	choose your tax class to apply to the quote
Display text field	Yes / no : for adding / hiding coment
Manufacturer attribut	Select the attribute of the default manufacturer

Quote notification

Quote Notification		
Email Sender	General Contact <input type="text"/>	[STORE VIEW]
Email Template	New quotation available (Default Template from Lc <input type="text"/>	[STORE VIEW]

Settings	Comment
Email Sender	Email to use to send new request notification
Email Template	Email template to use

Quotation request

Quote request

Allow text quotation request	<input type="text" value="Yes"/>	[STORE VIEW]
Allow quotation request from product view	<input type="text" value="All products"/>	[STORE VIEW]
Allow quotation request from cart	<input type="text" value="Yes"/>	[STORE VIEW]
Allow quote request for this customer groups	<input type="text" value="-- Please Select --"/> <ul style="list-style-type: none"> <li style="background-color: #0070c0; color: white; padding: 2px;">General <li style="background-color: #0070c0; color: white; padding: 2px;">Wholesale <li style="background-color: #0070c0; color: white; padding: 2px;">Retailer <li style="background-color: #0070c0; color: white; padding: 2px;">QAAAA 	[STORE VIEW]
Email Sender for Quotation Request	<input type="text" value="General Contact"/>	[STORE VIEW]
Send to	<input type="text"/>	[STORE VIEW]
Email Template for Quotation Request	<input type="text" value="Quote request (Default Template from Locale)"/>	[STORE VIEW]
Disable add to cart button for individual request products	<input type="text" value="No"/>	[STORE VIEW]

Settings	Comment
Allow text quotation request	if enabled, customer could request for quotation using a form from customer area
Allow quotation request from product view	Select : "no" or "only enabled products" or "all products" to display the button for quotation request
Allow quotation request from cart	Yes / no
Allow quote request for this customer group	Choose customer's group (multiselect)
Email sender for quotaton request	Email to use to send new request notification from customer
Send to	Email to use to send new request notification
Email template for quotaton request	Email template to use
Disable had to cart button for individual request product	Yes / no

Cart options

Cart options	
Empty cart after quote request	Yes [GLOBAL]
Empty cart before adding quote	Yes [GLOBAL]

Settings	Comment
Empty cart after quote request	Clear the customer cart
empty cart before adding quote	Yes / no

Customer reminder

Customer reminder	
Enable	No [GLOBAL]
Reminder Delay (days)	[GLOBAL]
Email Sender	General Contact [STORE VIEW]
Email Template	Customer reminder (Default Template from Locale) [STORE VIEW]

Settings	Comment
Enable	Yes / no
Reminder delay	Enter the delay in days
Email sender	select the sender
Email template	Choose the template for email

Work with Quotations

Create a new Quotation

To create a new quotation:

- Go inside customer view
- Select quotation tab
- Click on "new quotation" tab
- Fill quotation caption and then click on "save" button
- A new quotation is created and displayed

The screenshot shows the 'Customer Information' section for 'zimmermann olivier'. On the left, there is a navigation menu with options: Customer View, Quotations, Account Information, Addresses, Orders, and Shopping Cart. The main area displays a toolbar with buttons: Back, Reset, Create Order, Delete Customer, Save Customer, and Save And Continue Edit. Below the toolbar, there is a 'Create New Quotation' button and a pagination control showing 'Page 1 of 1 pages | View 20 per page | Total 2 records found'. A table lists the quotations:

Ref	Created At	Caption	Action
20090002001	2009-06-03	PC Gamer	Remove

Add Products

For adding product click on the "product" tab, there are 2 ways to add products to quotation :

- Select products from stock : click on "Add from products list" button, checked wanted products and then select "Add to quotation" in combo box.
- Add fake product: to add a fake product, click on "Add fake product" button, fill the field and click on "Add" button. A fake product is interesting if you wish to sell services or products not present in the database.

Once products are added, you can set several information :

The screenshot shows the 'Quotation Items' table with the following data:

Position	Product Id	Sku	Name	Qty	Price	Cost	Weight	Exclude	Action
0	2	bg	Boitier Gamer	1	120.00	1.12	2.00	<input type="checkbox"/>	Remove
2	1	cg45	Carte graphique G45	2	240.00	0.00	1.00	<input type="checkbox"/>	Remove
4			Assemblage	1	11.00	0.00	5.00	<input type="checkbox"/>	Remove

To save changes, click on "Save" button

Find a Quotation

There are 2 ways to find an existing quotation:

- Use customer view and then select "quotation" tab
- Use search form using Customer > Quotation menus

Edit a Quotation

On the quotation, more information can be filled:

Edit Quotation

Back Create Product Save Duplicate

Quotation #2009060009

<p>Customer: jimmermaco.olkier</p> <p>Created at: 2009-06-05</p> <p>Updated at: 2009-06-05</p> <p>Caption *: <input type="text" value="PC Gamer"/></p> <p>Valid until: <input type="text" value="2009-06-25"/></p> <p>Message: <input type="text" value="Do not hesitate to call me back at +33 00 00 000 00 for further information"/></p> <p>Free Shipping: <input type="checkbox"/></p> <p>Product: Quotation not transformed into product.</p>	<p>Show detail prices: <input checked="" type="checkbox"/></p> <p>Is visible?: <input checked="" type="checkbox"/></p> <p>Price (excl tax): <input checked="" type="checkbox"/> Calculate from subitems 611.00</p> <p>Weight: <input checked="" type="checkbox"/> Calculate from subitems 9.00</p> <p>Last Notification Date: 2009-06-04 08:25:00 (Logout Customer)</p> <p>Associated Promotion: No promotion associated</p>
--	--

Fields	Comments
Customer	Linked customer
Created at	Date of creation
Updated At	Date of last update
Caption	Quotation short description
Valid until	Limit date for customer to use quotation
Message	Personnal message for customer
Free Shipping	If checked, free shipping will be applied when placing order
Product	Product generated for this quotation
Show detail prices	If checked, sub items price will be displayed in PDF and front office
Status	Define quotation status : <ul style="list-style-type: none"> New : quotation is created but not visible by customer Customer request : quotation is created because customer made a quotation request. You must set status to "active" to allow customer to view it Active : customer can view quotation Expired : quotation is expired
Price (excl tax)	Quotation Price. If "Calculate from subitems" is checked, price is calculated as sum of subitems price. If not checked, you can set any value
Weight	Quotation Weight. If "Calculate from subitems" is checked, weight is calculated as sum of

	subitems weight. If not checked, you can set any value
Last Notification	Date of customer notification
Associated promotion	If free shipping is checked, a magento promotion is created

To save changes, click on "Save" button

Printing / Customer notification

To print a quotation, click on "print" button

Notice: "print" button is not available if quotation is not transformed as product. To transform quotation in product, click on "Create product" button

To notify customer, click on "Notify customer" link (quotation will automatically be set visible).

To modify email content, use Magento transactional email menu.

Duplicate quotation

To duplicate a Quotation, click on "Duplicate" button inside quotation view and then select target customer :

Duplicate Quotation

Id: 200905009
Caption: PC Gamer

Page 1 of 1 pages | View 20 per page | Total 2 records found Reset Filter Search

Id	Firstname	Lastname	Email
1	Zimmermann	olivier	zimmermannolivier@gmail.com
2	Axelle	Prevost	ap@ap.com

Fields	Comments
Position	Set products order in quotation
Product Id	Empty if fake product
Réf.	Product Sku
Name	Product Name
Qty	Product Qty
Price	Unit price (excl tax)
Cost	Product cost (read only)
Weight	Product weight
Exclude	If checked, product could be removed from quotation by customer. This is usefull to propose additional options to quotation.
Action	To remove a product from quotation

Customer side

Quotations list

Once a quotation is visible, customer can view it from customer area :



MY ACCOUNT

- Account Dashboard
- Account Information
- Address Book
- My Orders
- My Product Reviews
- My Tags
- Newsletter Subscriptions
- My Wishlist
- My Downloadable Products
- My Quotations**

My Quotations

Quotation #	Date	Caption	
20090002001	6/5/09	PC Gamer	View Quotation
2009080009	6/5/09	PC Gamer	View Quotation

Click on the link to view the contain of the quotation.



MY ACCOUNT

- Account Dashboard
- Account Information
- Address Book
- My Orders
- My Product Reviews
- My Tags
- Newsletter Subscriptions
- My Wishlist
- My Downloadable Products
- My Quotations

Quote # : 20090002001 - PC Gamer

Creation date : June 3, 2009 [Add to Cart](#) [Print Quotation](#)
Valid until : June 25, 2009

Comme convenu, voici la configuration définie ensemble lors de notre entretien téléphonique. Nous restons à votre disposition pour tous renseignements complémentaires.

Reference	Name	Qty	Unit Price (excl tax)	Unit Price (incl tax)	Total (excl tax)	Total (incl tax)
quotation_2	Devis no 20090002001 - PC Gamer 2x Carte graphique G45 1x Assemblage	1	€491.00	€532.12	€491.00	€532.12
bg	Boitier Gamer	1	€120.00	€130.05	€120.00	€130.05

Did you know?
Our customer service is available **24/7**

From quotation view, customer can :

- Print quotation
- Add quotation to cart

Shopping Cart									Proceed to Checkout
Remove		Product Name	Move to Wishlist	Unit Price		Qty	Subtotal		
				(Excl. Tax)	(Incl. Tax)		(Excl. Tax)	(Incl. Tax)	
		Devis no 20090002001 - PC Gamer Description 2 x Produit 1 Description2 1 x Assemblage	<input type="checkbox"/>	€491.00	€532.12	<input type="text" value="1"/>	€491.00	€532.12	
		Produit 2	<input type="checkbox"/>	€120.00	€130.05	<input type="text" value="1"/>	€120.00	€130.05	

Quotation request

If you enabled « customer quotation request » in magento config section, customer can request for a quotation from their cart:

Request for a new quotation

1. Select products from your cart

Product	Qty
Echarpe en toile	<input type="text" value="100"/>
Sofa	<input type="text" value="100"/>

2. Type your message

Please offer us your best prices for those large quantities

Clicking on « create request » button, customer is redirected to a page in wich they can select product to include in quotation inquiry plus an area to fill comments. If customer is not logged in, he is redirected to magento authentication page to log in or to create an account.

Once customer has filled information, a new quotation is created with “customer request” status. Then, administrator has to fill required information such as expiration date and product prices and notify customer.

After customer is notified, quotation status is set to “active” to allow customer to view it.

Misc

Taxes

There is no explicit tax management inside a quotation : as a quotation is transformed in product, magento applies taxes as other products.

Notice: if you create a quotation for a new customer, it's better to set billing and shipping addresses as magento use those information to calculate taxes.