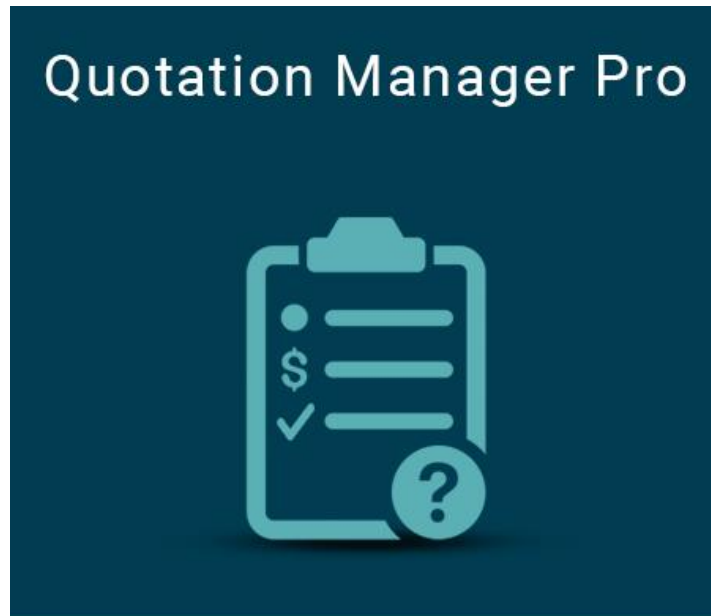


Quotation Manager Pro for Magento 2 User Manual



Quotation Manager Pro Extension

By



MageBees a Venture by Capacity Web Solutions Pvt. Ltd.

Support Ticket :- <https://support.magebees.com/> , Support Email :- support@magebees.com

Quotation Manager Pro Extension for Magento 2 By MageBees

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Introduction:

Detailed Summary of Quotation Manager Pro Extension:

Our Quotation Manager Pro module allows customers on your Magento shopping cart website to request quotes for products instead of immediately adding them to the shopping cart. This is useful for businesses that like to negotiate pricing with customers. Often this is done to get bulk discounts, discounts based on special corporate customers.

Create, send, and manage Quotes in Magento 2. Receive quote requests through your front-end or start new quotations from your Magento backend. Negotiate prices and terms with your customers and send quotes with custom prices and custom products that are created on the fly via your Magento backend. Our Quotation Manager Pro also features follow-up quote e-mails, attaching PDF proposals and much more. With our extension you can get quote proposal price including shipping price and product tax. Extension provides the feature for hide price of product customer group and product sku wise.

Our extension is easy to setup and give many options which are configuring from admin.

Features:

1. Assign submitted quote to the selected admin.
2. Choose whether to show or hide "Add to Quote" button on product page.
3. Choose whether to show or hide "Add to Quote" button on category page.
4. Support translation via Magento Localization features.
5. Support all type of magento product.
6. Allow customer to Attach file when submit quote request.
7. Give professional email template for customer and sales representative notifications.
8. Allow to Send CC emails of your requests and quotes to more peoples.
9. Allow to send proposal in PDF format.
10. Allow to add additional attachment to the transactional emails.
11. Show Quote Profit / Loss amount based on the cost price and original price in the Quote View.

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12. Lock Quote Base on the Admin / Customer action on the Quote.
13. Create and Manage quote from the Magento Back end.
14. Convert Quote To Order Easily.
15. Manage and edit all quotes as administrator within the Magento back-end.
16. Easy communication with the customer and also notify using email to the customer / admin both.
17. Admin use custom price at the time of Quotation request.
18. It provides a user friendly interface for customers to apply for quote.
19. It allows negotiating for the quote and keeps track for entire communication history.
20. There are email notifications for every action.
21. Allow to display Add To Quote Button for all products or specific product with “**Apply Add To Quote**” attribute.
22. Allow to display Add To Quote Button Customer Group wise.
23. Allow to show/hide Add To Cart when Add To Quote Button is enabled for product.
24. Provide Functionality for Manage Stock of Quote Item. With this functionality you can quote for product even if sufficient quantity not available when quote for product.
25. Allow to Hide Product Price Customer Group wise and Product SKU wise.
26. Provide Quotation Proposal Price Including Shipping Price and Product Tax
27. Allow to Create Customer when create the quote from Backend and Frontend.
28. Allow to enable/disable Generate Quote for Guest Customer.
29. Allow to enable/disable Checkout on Quote for customer.
30. Allow to set the Quote expiration time.
31. Allow to Customize the quote email template for admin and customer.

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Benefit of Quotation Manager Pro:

- ⇒ It provides a user friendly interface for customers to apply for quote.
- ⇒ It decrease abandon cart ratio.
- ⇒ It allows negotiating for the quote and keeps track for entire communication history.
- ⇒ Provide email notifications for each action.
- ⇒ User can convert quotes to order.

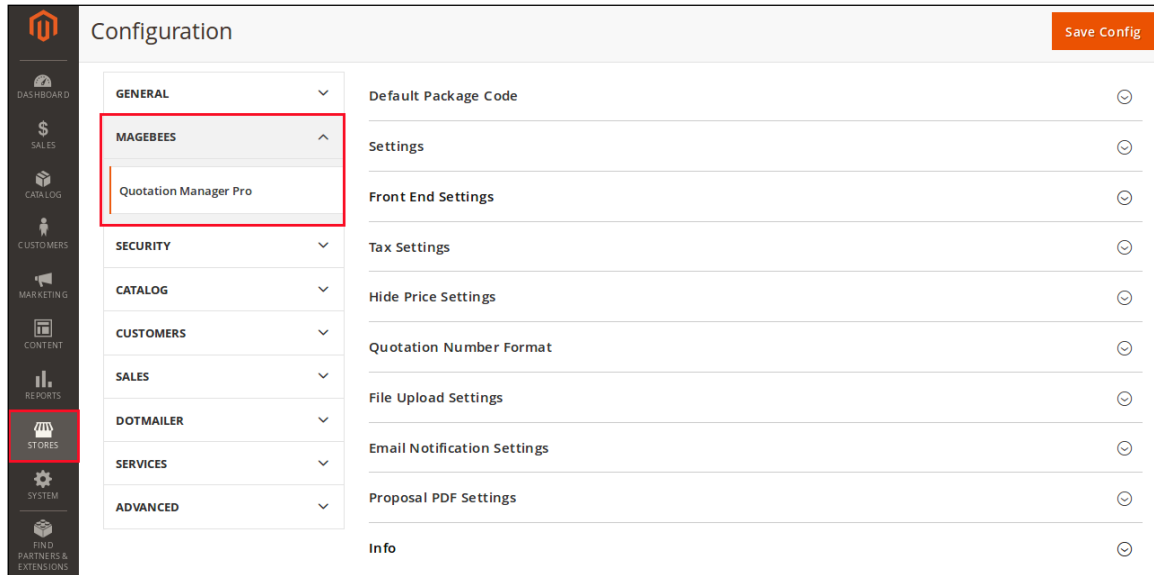
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⇒ CONFIGURATION SETTINGS

Step-1

⇒ Go to admin → STORES → Configuration → MAGEBEES → Quotation Manager Pro.

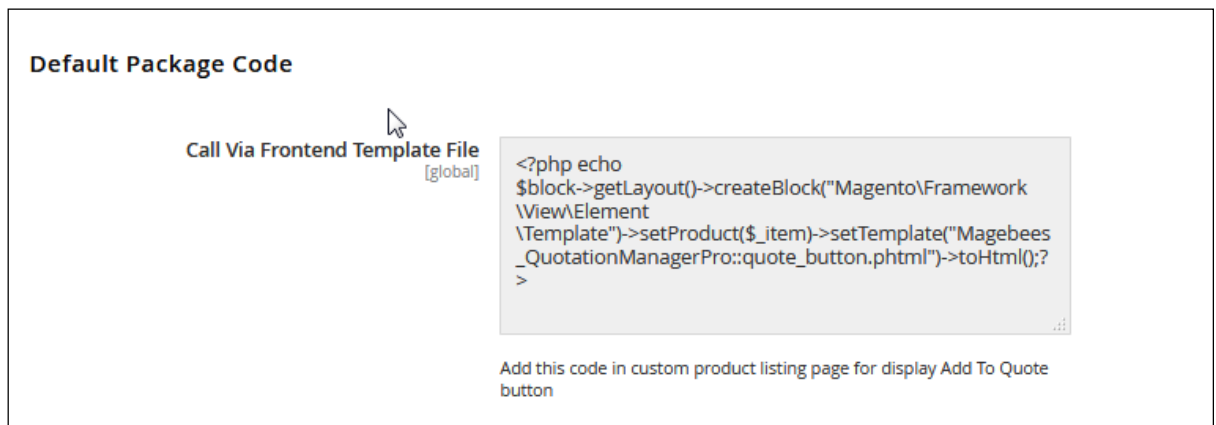
You will get Following Screen.



The screenshot shows the Magento 2 Configuration page. The left sidebar contains a menu with categories like DASHBOARD, SALES, CATALOG, CUSTOMERS, MARKETING, CONTENT, REPORTS, STORES, SYSTEM, and FIND PARTNERS & EXTENSIONS. The 'STORES' category is highlighted. The main content area is titled 'Configuration' and has a 'Save Config' button in the top right corner. A dropdown menu is open, showing 'MAGEBEES' selected, with 'Quotation Manager Pro' listed below it. The right side of the page displays a list of configuration settings, each with a dropdown arrow: Default Package Code, Settings, Front End Settings, Tax Settings, Hide Price Settings, Quotation Number Format, File Upload Settings, Email Notification Settings, Proposal PDF Settings, and Info.

Step-2

⇒ Click on **Default Package Code** Tab. You will get Following Screen.



The screenshot shows the 'Default Package Code' configuration page. It features a text input field with the placeholder text 'Call Via Frontend Template File [global]'. A mouse cursor is pointing at the input field. Below the input field is a code block containing the following PHP code:

```
<?php echo  
$block->getLayout()->createBlock("Magento\Framework  
View\Element  
\Template")->setProduct($_item)->setTemplate("Magebees  
_QuotationManagerPro::quote_button.phtml")->toHtml();?  
>
```

Below the code block, there is a note: 'Add this code in custom product listing page for display Add To Quote button'.

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Use this short code If you want to display Add To Quote Button on Custom product list template. Add this short code in your custom template before add to cart button.

Step-3

⇒ Click on **Settings** Tab. You will get Following Screen.

Settings

Enabled <small>[store view]</small>	Yes	▼
	Select Yes for enable quotation manager in frontend.	
Assign Quotation To Selected Admin <small>[store view]</small>	admin	▼
	Assign Generated Quotation To Selected Admin	
Access Quotation By <small>[store view]</small>	All Admin	▼
	Access Generated Quotation To Selected Admin	
Allow Guest Customer To Submit Quote <small>[store view]</small>	Yes	▼
	Select Yes for allow guest customer to submit quote.	
Allow Customer Checkout On Quote <small>[store view]</small>	Yes	▼
	Select Yes for allow customer to checkout for quote.	
Enable Quote Expiration Time <small>[store view]</small>	Yes	▼
	Select Yes for enable quote expiration time	
Default Expiration Time <small>[global]</small>	7	
	In Days. Defines default quote expiry date.	

- ⇒ **Enabled:** You can able to enable or disable this module from choosing Yes/No.
- ⇒ **Assign Quotation To Selected Admin:** Assign newly created quotation to the selected admin user.
- ⇒ **Access Quotation By:** Quotation will be access by all admin or the admin which is assigned to quote.

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- ⇒ **Allow Guest Customer To Submit Quote** : Select Yes for allow the guest customer to submit quote. If Option is set to NO then customer has to compulsory create an account for submit quote.
- ⇒ **Allow Customer Checkout On Quote** : This option allow to enable/disable the checkout process of quote for customer. If Option is set to No then customer can't able to proceed to checkout the quote and not able to create an order from quote.
- ⇒ **Enable Quote Expiration Time** : Select Yes for manage quote expiration time
- ⇒ **Default Expiration Time** : Set the default quote expiration time in days. Expiration date will be calculated form quote submitted date and default expiration time.

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Step-4

⇒ Click on **Front End Settings** Tab. You will get Following Screen.

Front End Settings

Apply Add To Quote Button To [store view]
Apply Add to Quote button for all products or apply for specific product using 'Apply Add To Quote' attribute.

Not Applied for Product SKUs [store view]
Seperated by comma

Disable Quotation for Categories [store view]

- What's New
- Women
- Tops
 - Jackets
 - Hoodies & Sweatshirts
 - Tees
- Bras & Tanks
- Bottoms
 - Pants

"Add To Quote" button will disabled for the product which is assigned in selected category.This will be applicable on product listing page and product detail page

Display Quote Button for Selected Group(s) [store view]
Select Yes for display Add to Quote button for selected customer groups only.

Display Button on Category Page [store view]
Select Yes for display "Add To Quote" button on category page.

Display Button on Product Detail Page [store view]
Select Yes for display "Add To Quote" button on product detail page.

Display Add To Cart Button [store view]
Select Yes for display add to cart button.
Note: Works only if Add To Quote button is enable for product.
When Hide product price is enabled then Add To Cart Button will not display.

Enable Manage Stock for Quote [website]
Select Yes for manage stock for quote.
Note: Work only if "Manage Stock" is set to "Yes" for the quote product in "Advance Inventory" section.

Enable Default Qty Conditions for Quote Products [website]
Select Yes for enable default qty conditions check for quote products.

Minimum Quote Amount per Customer Group [website]

Customer Group	Minimum Amount	Message	Action
<input type="button" value="Add"/>			

Product Remark Info [store view]
Select Yes for enable product remark info.

Lock Proposal [store view]
Proposal items cannot be removed or added from quote via the shopping cart.

After Adding a Product Redirect to Quotation List [store view]
Select Yes for redirect to quotation list after adding a product to quote.

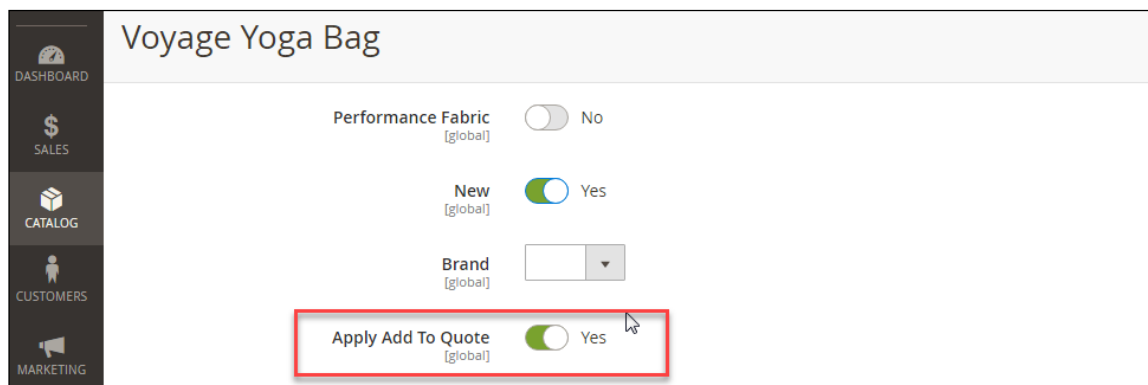
Required Shipping Address [store view]

Enable Move to Cart [store view]
Allow customers to transfer their Quote Items directly to the Shopping Cart.

Enable Move to Quote [store view]
Allow customers to transfer their Cart to the Quote.

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- ⇒ **Apply Add To Quote Button To** : This option allow to display add to quote button for all product or specific product. By selecting “**All Products**” option add to quote button will apply for all product and by selecting “**Product in which "Apply Add To Quote" attribute applied**” you can enable/disable add to quote button product wise with set the “**Apply Add To Quote**” attribute to Yes/No in product section from backend.



- ⇒ **Display Quote Button for Selected Group(s)**: This option allow to display Add to Quote button to all customer or selected customer group.
- ⇒ **Choose Customer Group(s) for Allow Quotation**: This option will available when “**Display Quote Button for Selected Group(s)**” is set to Yes. Select the Customer Group for which you want to enable the Add To Quote button.
- ⇒ **Display Button on Category Page**: This option allows to enable/disable Add to quote button on category page.
- ⇒ **Display Button on Product Detail Page**: This option allows to enable/disable Add to quote button on product detail page.
- ⇒ **Enable Manage Stock for Quote**: On choosing “**No**”, you can add to quote product even if sufficient quantity not available for product.




Note: This option work only with product quantity. It means this option allow to request a quote even if sufficient quantity not available.

Out of stock product's option will not manage with this functionality it will work with default magento's manage stock functionality.

- ⇒ **Display Add to Cart Button**: This option allows to enable/disable Add to Cart Button when add to quote button is enable for product.
- ⇒ **Note: Add To Cart Button will not display when “Hide Product Price” is set to Yes.**

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- ⇒ **Enable Tier Price Option:** Allow customer to add multiple quantity request at the time of Quote submitted.
- ⇒ **Product Remark Info:** Allow customer to add custom request Information product wise.

Item	Request Information	Original Price	Price	Qty
 Overnight Duffie	<input type="text"/>	\$48.71 <small>Excl. Tax: \$45.00</small>	45.0000	2 <input type="button" value="ADD QTY"/>
 Juno Jacket Size: S Color: Green	<input type="text"/>	\$66.68 <small>Excl. Tax: \$61.60</small>	61.6000	1 <input type="button" value="ADD QTY"/>
 Montana Wind Jacket Size: XL Color: Red	<input type="text"/>	\$42.43 <small>Excl. Tax: \$39.20</small>	39.2000C	1 <input type="button" value="ADD QTY"/>

Clear Quote Update Quotation Move Quote Items to Shopping Cart

Add File To Quote
 No file chosen

Remarks

Shipping Address Detail

Billing Address Detail

Estimate Shipping Methods

Free Shipping
Free- \$0.00

Best Way
Table Rate- \$0.00

Pickup In Store
Pickup In Store- \$10.83 (Excl. Tax \$10.00)

Flat Rate
Fixed- \$21.65 (Excl. Tax \$20.00)

Sub Total (Excl. Tax)	\$190.80
Sub Total (Incl. Tax)	\$206.53
Estimated Shipping & Handling (Excl. Tax)	\$0.00
Estimated Shipping & Handling (incl. Tax)	\$0.00
Tax	\$15.73
Quote Total	\$206.53

[Fig. Display the quote page in which tier price and product remark info is enabled]

- ⇒ **Lock Proposal:** Proposal items cannot be removed or added/update from quote via the shopping cart.
- ⇒ **After Adding a Product Redirect to Quotation List:** Using this option customer allows redirecting to Quote list page after add the product to quote.
- ⇒ **Required Shipping Address:** You can enabled/Disable Shipping address when you submit quotation.
- ⇒ **Enable Move to Cart:** You can move Quote Items into cart section Using “Move Quote Items to Shopping Cart” From Quote Page.
- ⇒ **Enable Move to Quote:** You can move Cart Items into quote section Using “Move Items To Quote” Button from cart page.

Quotation Manager Pro Extension for Magento 2 By MageBees

Step-5

⇒ Click on **Tax Settings** Tab. You will get Following Screen.

Tax Settings

Include Product Tax in Quote
[store view]

Select Yes for include product tax quote.
Note: Work only if "Display Product Prices In Catalog" is applied with include tax from tax configuration.

Include Shipping Method in Quote
[store view]

Select Yes for Include shipping method while submit quote.

- ⇒ **Include Product Tax in Quote** : Choose Yes for Include the Product Tax Price in Quote Proposal Price.
- ⇒ **Note: This feature will work only If "Display Product Prices In Catalog" is set to "Including Tax " or "Including and Excluding Tax" from Stores-> Configuration ->SALES -> Tax ->Price Display Settings -> Display Product Prices In Catalog.**
- ⇒ **Include Shipping Method in Quote** : Choose Yes for Include the Shipping Price in Quote Proposal Price.

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Step-6

⇒ Click on **Hide Price Settings** Tab. You will get Following Screen.

Hide Price Settings

Hide Product Price [store view] ▼
Select Yes for hide product price for all products.

Not Applied for Product SKUs [global]
Seperated by comma

Apply For Customer Group(s) [store view]

NOT LOGGED IN

General

Wholesale

Retailer

Hide price for the selected customer groups only.

Show Price before admin sent Quote proposal [store view] ▼
Select Yes for show price before admin sent quote proposal in quote view page.

Hide Price Text [global]
Set Hide Price Text

Hide Price Text Url [global]
Set Hide Price Text Url

Quotation Manager Pro Extension for Magento 2 By MageBees

- ⇒ **Hide Product Price:** Select Yes for Hide the Product Price for all products.
- ⇒ **Not Applied for Product SKUs:** Set the comma separated product skus for which you don't want to hide the product price.
- ⇒ **Apply For Customer Group(s):** Select the Customer Group for which you want to enable the Hide Product Price.
- ⇒ **Show Price before admin sent Quote proposal:** When Hide Product Price is set to Yes, You can show/hide the product price before admin sent the quote proposal.
- ⇒ **Hide Price Text:** Set the Text which you want to display when Hide Product Price is set to Yes.
- ⇒ **Hide Price Text Url:** Set the Hide Price Text Url for the Hide Price Text .

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⇒ **Step-7**

⇒ Click on **Quotation Number Format** Tab. You will get Following Screen.

Quotation Number Format

Quotation Number Prefix [global]
Set quotation number prefix

Current Quotation Number [global]
Set current quotation number

Quotation Increment Number [global]
Set quotation increment number

You can set Custom Quote Increment Id using following Quotation Number Format fields.

- ⇒ **Quotation Number Prefix:** Set Quotation Number Prefix as per the requirements using Quotation prefix.
- ⇒ **Current Quotation Number:** Allow to change Current Quotation Number.
- ⇒ **Quotation Increment Number:** Allow to Change Quote Increment Number using the Quotation Increment Number.

Step-8

⇒ Click on **File Upload Settings** Tab. You will get Following Screen.

File Upload Settings

Allow File Upload [global]
Select Yes for allow file upload.

Allowed File Type [global]
Set allowed file extension [ex:png,jpg,pdf]

- ⇒ **Allow File Upload:** This option will allow customer to attach file when submit quote request.
- ⇒ **Allowed File Type:** With this option you can set allowed file type like jpg, png, or pdf etc. [comma separated values like ex. pdf,jpg,jpeg,png]

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Step-9

- ⇒ Click on **Email Notification Settings** Tab. You will get Following Screen.
- ⇒ Provide professional email templates for the following different status of the quotations.

Email Notification Settings

Quote Email Sender [store view] ▼

Send Quote Email Copy To [store view]
Comma-separated

New Quote Request Template [store view] ▼
Select email template to be sent.

Quote Proposal Template [store view] ▼
Select email template to be sent.

Quote Request Cancel Template [store view] ▼
Select email template to be sent.

Quote Request Reject Template [store view] ▼
Select email template to be sent.

Proposal Accept Template [store view] ▼
Select email template to be sent.

Customer Reply To Admin Template [store view] ▼
Select email template to be sent.

Admin Reply To Customer Template [store view] ▼
Select email template to be sent.

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- ⇒ **Quote Email Sender** : Allow to set the quotation email sender.
- ⇒ **Send Quote Email Copy To**: Transaction email sends to the multiple email account using Send Quotation Email Copy to field.
- ⇒ **New Quote Request Template** : Email Send to the customer as well as admin/sales representative with the detail information about quote when customer submit new quote request.

Hello Veronica Costello,



Thank you for your quote from Main Website Store. You can check the status of your quote by [logging into your account](#).

If you have questions about your quote, you can email us at support@example.com.

Your Quote #magebeesQuote 78

Placed on Jan 29, 2019 12:27:01 PM

Billing Info	Shipping Info
Veronica Costello 686 89769, Alaska, jghjgh United States T: 65475	Veronica Costello 686 89769, Alaska, jghjgh United States T: 65475

Image	Items	Qty	Price
	Fusion Backpack SKU: 24-MB02	1	\$59.00
	Juno Jacket SKU: WJ06-S-Green Size S Color Green	1	\$77.00

Subtotal Original	\$136.00
Tax	\$11.22
Shipping & Handling	\$10.00
Grand Total	\$157.22

[New Quote Request Template]

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- ⇒ **Quote Proposal Template:** Admin Create Quote Proposal and Notify to the customer using this template. We had also provided quote proposal in the pdf format to the customer at the time of Quote Submit.

Hello Veronica Costello,



Thank you for your Quotation Request from Main Website Store. You will find our proposal in the attached PDF. You can check the status of your quote by [logging into your account](#).

If you have questions about your quote, you can email us at support@example.com.

Your Quotation Request #magebeesQuote 78

Updated on Jan 29, 2019 12:52:57 PM

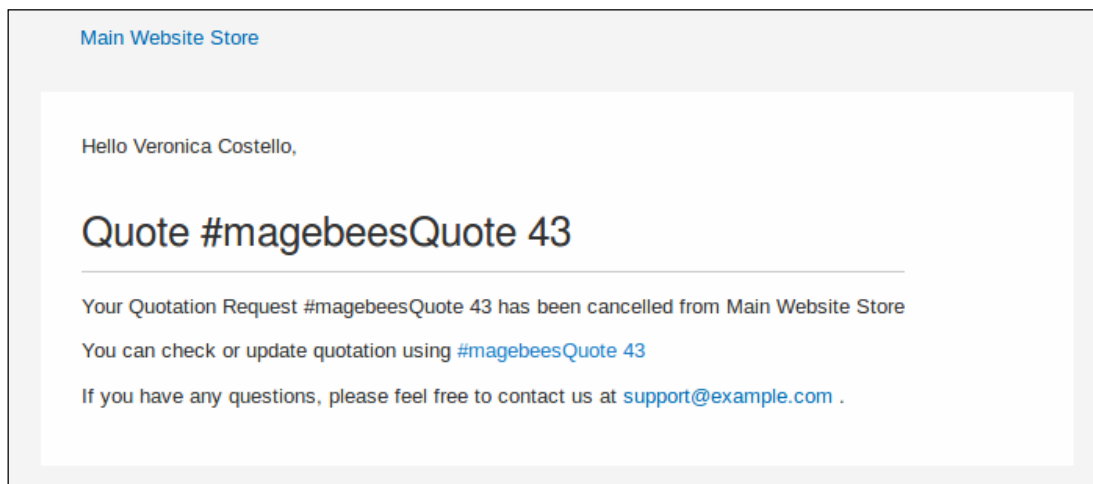
<p>Billing Info</p> <p>Veronica Costello 6146 Honey Bluff Parkway Calder, Michigan, 2618 United States T: (555) 229-3326</p>	<p>Shipping Info</p> <p>Veronica Costello 6146 Honey Bluff Parkway Calder, Michigan, 2618 United States T: (555) 229-3326</p>
---	--

Image	Items	Price	Qty	Proposal Price	Subtotal
	Fusion Backpack	\$59.00	2	\$55.00	\$110.00
	SKU: 24-MB02		1	\$59.00	\$59.00
	Juno Jacket	\$77.00	5	\$70.00	\$350.00
	SKU: WJ06-S-Green		1	\$77.00	\$77.00
	Size S		3	\$75.00	\$225.00
	Color Green				
Subtotal Original					\$503.00
Adjustment Quotation					-\$43.00
Subtotal					\$460.00
Tax					\$37.98
Shipping & Handling					\$35.00
Grand Total					\$532.98

[Quote Proposal Template]

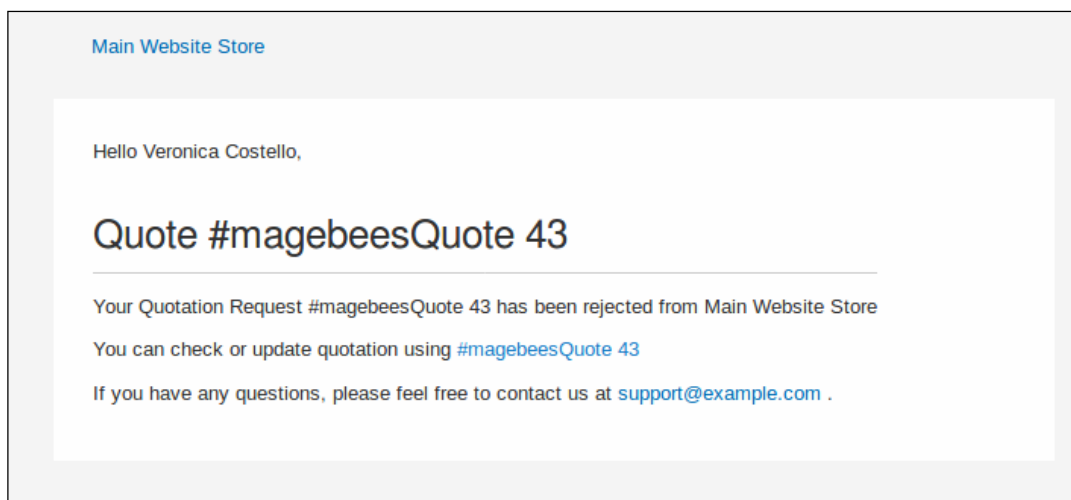
Quotation Manager Pro Extension for Magento 2 By MageBees

- ⇒ **Quote Request Cancel Template:** When customer Edit Quote then Current Quote will be cancel and new Duplicate Quote will be created and When Customer Submit new Quote then it will generate the New Quote. It will notify to the customer and Admin both.



[Quote Request Cancel Template]

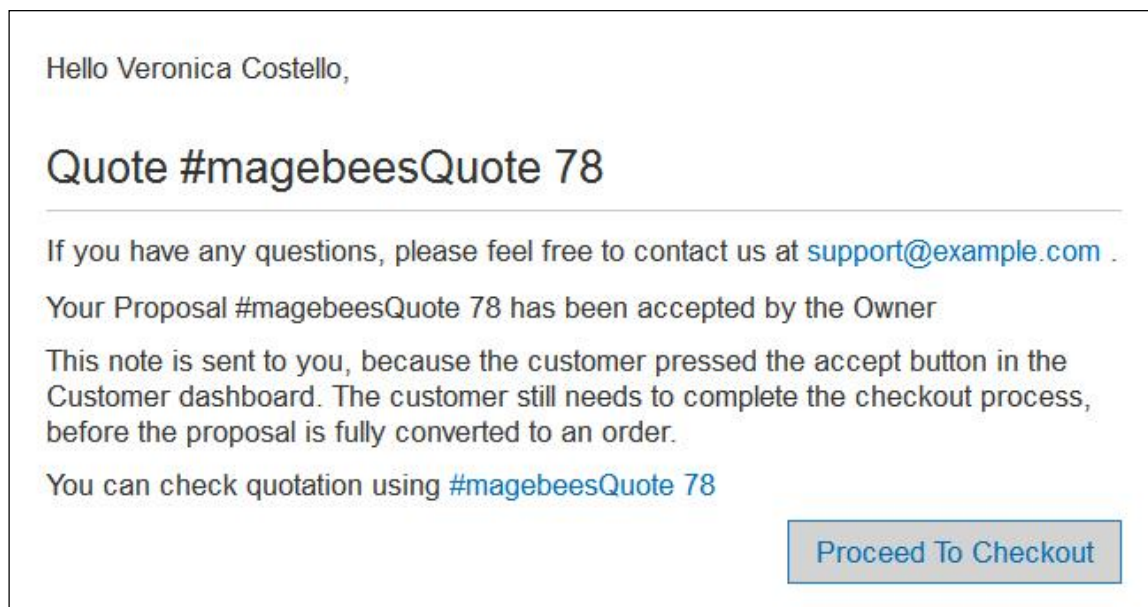
- ⇒ **Quote Request Reject Template:** When customer / admin Reject Quote then Current Quote will be rejecting and it will notify using following email template.



[Quote Request Reject Template]

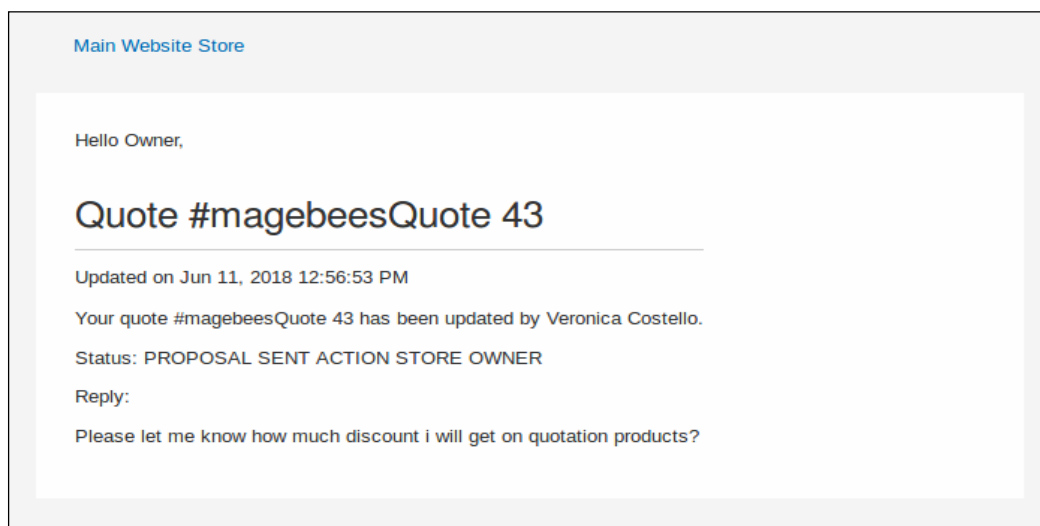
Quotation Manager Pro Extension for Magento 2 By MageBees

- ⇒ **Proposal Accept Template:** When Customer Click on Confirm and Checkout button from the View Quote page then it will notify to the admin and customer using the following email.



[Quote Proposal Accept Template]

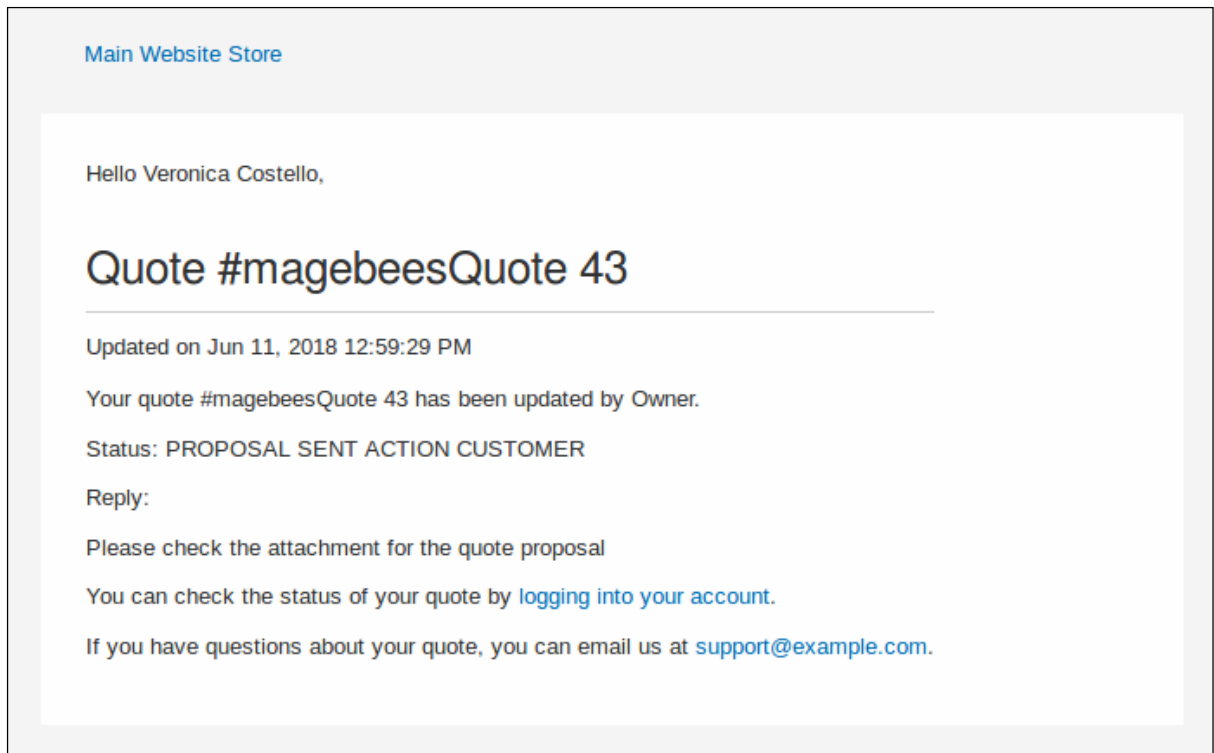
- ⇒ **Customer Reply to Admin Email:** When Customer Reply to admin using Communication section then it will notify to the admin using following email template.



[Customer Reply to Admin Email Template]

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- ⇒ **Admin Reply to Customer Email:** When Admin / Sales Representative reply to the customer using the Communication section from admin side then it will notify to the customer using the following email template.



[Admin Reply to Customer Email Template]

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Step-10

⇒ Click on **Proposal PDF Settings** Tab. You will get Following Screen.

Proposal PDF Settings

Show Remark In PDF
[store view] Yes

Disable to hide remark in PDF.

Show Quote Adjustment to Customers
[store view] Yes

Total quote discount will be visible for customers in the Proposal total block.



Set Standard (Fixed) Remark with Proposal
[store view]

Lorem Ipsum is simply dummy text of the printing and typesetting industry. Lorem Ipsum has been the industry's standard dummy text ever since the 1500s, when an unknown printer took a galley of type and

Add remark that appears in the quote proposal PDF.

- ⇒ **Show Remark in PDF:** Using this Option we will able to show / hide remark in the Quotation PDF file.
- ⇒ **Show Quote Adjustment to Customers:** Using this Option we will able to show / hide quote adjustments amount in the PDF.
- ⇒ **Set Standard (Fixed) Remark with Proposal:** Using this Option we will be able to set custom note in PDF file.

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Quote # magebeesQuote 78						
Quote Created Date: Jan 29, 2019 12:27:01 PM						
Quote Updated Date: Jan 29, 2019 12:52:23 PM						
Sold to:			Ship to:			
Veronica Costello 6146 Honey Bluff Parkway Calder, Michigan, 2618 United States T: (555) 229-3326			Veronica Costello 6146 Honey Bluff Parkway Calder, Michigan, 2618 United States T: (555) 229-3326			
Products		Price	Proposal Price	Qty	Tax	Subtotal
Fusion Backpack		\$59.00	\$55.00	2	\$9.08	\$110.00
SKU:24-MB02		\$59.00	\$59.00	1	\$4.87	\$59.00
Juno Jacket		\$77.00	\$70.00	5	\$28.90	\$350.00
SKU:WJ06-S-Green		\$77.00	\$77.00	1	\$6.35	\$77.00
		\$77.00	\$75.00	3	\$18.57	\$225.00
<i>Size</i>						
S						
<i>Color</i>						
Green						
					Subtotal Original:	\$503.00
					Adjustment Quotation :	-\$43.00
					Quoted Total:	\$460.00
					Tax:	\$37.98
					Shipping and Handling:	\$35.00
					Grand Total:	\$532.98
<p>Lorem Ipsum is simply dummy text of the printing and typesetting industry. Lorem Ipsum has been the industry's standard dummy text ever since the 1500s, when an unknown printer took a galley of type and scrambled it to make a type specimen book. It has survived not only five centuries, but also the leap into electronic typesetting, remaining essentially unchanged. It was popularised in the 1960s with the release of Letraset sheets containing Lorem Ipsum passages, and more recently with desktop publishing software like Aldus PageMaker including versions of Lorem Ipsum.</p>						

[Fig: Proposal PDF]

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Customer Account Section:

- ⇒ Go to **My Account -> My Quotations:**
- ⇒ In this section customer will able to see list of submitted quotes.


Quote #	Date	Status	Action
magebeesQuote 37	Jun 11, 2018 10:33:05 AM	NEW REQUESTED	View Quote
magebeesQuote 38	Jun 11, 2018 6:29:56 AM	NEW REQUESTED	View Quote
magebeesQuote 36	Jun 11, 2018 4:29:14 AM	NEW REQUESTED	View Quote
magebeesQuote 31	Jun 8, 2018 5:26:10 AM	PROPOSAL PROCESSING	View Quote
magebeesQuote 32	Jun 4, 2018 10:58:37 AM	NEW REQUESTED	View Quote
magebeesQuote 30	Jun 4, 2018 5:33:26 AM	PROPOSAL SENT ACTION CUSTOMER	View Quote
magebeesQuote 29	Jun 2, 2018 7:39:32 AM	NEW REQUESTED ACTION FOR STORE OWNER	View Quote
magebeesQuote 28	Jun 2, 2018 4:51:13 AM	PROPOSAL ACCEPTED	View Quote
magebeesQuote 26	May 28, 2018 4:59:46 AM	NEW REQUESTED ACTION FOR STORE OWNER	View Quote
magebeesQuote 25	May 25, 2018 11:26:54 AM	PROPOSAL CANCELLED	View Quote


Items 1 to 10 of 16 total

1 2 >

Show 10 per page

For check quote information in the detail click on the **View Quote** link and customer will able to get full quote information.






What's New Women Men Gear Training Sale

#magebeesQuote 43

PROPOSAL SENT ACTION STORE OWNER
Print PDF

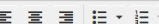




January 9, 2019

Product Name	Comment	Price	Qty	Proposal	Sub Total
 <p>Overnight Duffle SKU:24-WB07</p>		\$45.00	5	\$40.00	\$200.00
			1	\$45.00	\$45.00
				2	\$42.00

Original Subtotal	\$225.00
Adjustment Quotation	-\$25.00
Subtotal	\$200.00
Tax	\$0.00
Shipping & Handling	\$5.00
Grand Total	\$205.00

Quote Attachments

[quotation_pdf_#magebeesQuote 43.pdf](#)

Paragraph **B** *I* U     

Powered by TinyMCE

Attach Files
 No files selected.

Message History

2019-01-09 09:38:07 | PROPOSAL SENT ACTION STORE OWNER | By Veronica Costello

2019-01-09 06:30:21 | PROPOSAL SENT ACTION STORE OWNER | By Veronica Costello

Please give us Quotation

Remarks With Quote

Please Provide Quotation as soon as possible

Quote Address Information

<p>Shipping Address</p> <p>Veronica Costello 6146 Honey Bluff Parkway Calder, Michigan, 49628-7978 United States T: (555) 229-3326</p>	<p>Billing Address</p> <p>Veronica Costello 6146 Honey Bluff Parkway Calder, Michigan, 49628-7978 United States T: (555) 229-3326</p>
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MageBees a Venture by Capacity Web Solutions Pvt. Ltd.

Support Ticket :- <https://support.magebees.com/> , Support Email :- support@magebees.com

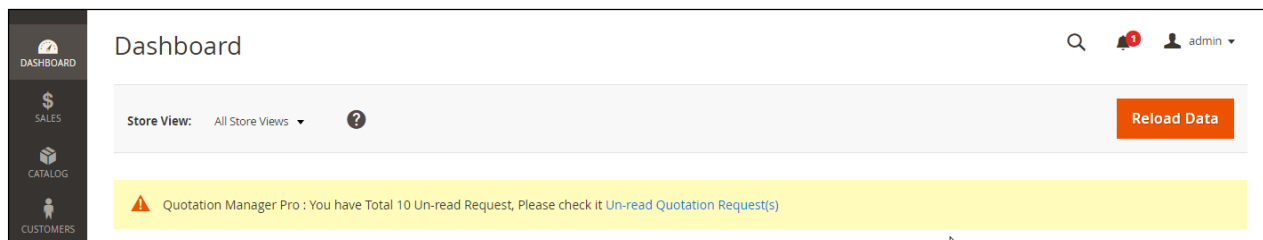
Quotation Manager Pro Extension for Magento 2 By MageBees

- ⇒ It will show current status of the quote.
- ⇒ It will show last updated date of the current quotation.
- ⇒ Customers will be able to see proposed price set by admin for the quote item in “Proposal” column.
- ⇒ When Customer adds tier price in the item then customer will be able to see multiple qty for the item with the price so using the radio button customer will be able to select one qty per item.
- ⇒ **Print PDF** : Using this we can be able to generate PDF file of the quotation information.
- ⇒ **Original Subtotal** : It will show quote items total with main product price.
- ⇒ **Adjustment Quotation**: It will show total discount amount given by the admin on this quote items.
- ⇒ **Subtotal** : It will show quote items total after the proposal price sent by admin.
- ⇒ **Tax**: It will show the total of quote items tax amount.
- ⇒ **Shipping Handling**: It will show the shipping and handling price for the quote items.
- ⇒ **Grand Total** : It will show the final quote item total amount after applying discount amount given by admin and include Tax and Shipping and Handling price if it is enabled from configuration.
- ⇒ **Reject Proposal**: Using this button customer will be able to reject the current quotation. It will notify email to the customer and sales representative also.
- ⇒ **Edit Quote**: Using edit quote button customer will be able to create new quote in which current quote items will be automatically added into the quote and current quote will be cancel. It will notify email to the customer and sales representative also.
- ⇒ **Confirm and Checkout**: Using this button customer will be able to accept the quote and add quote item into the cart. Then customer will be able to place order using current quote item. It will notify email to the customer and sales representative also.
- ⇒ **Quote Attachments** : This section will display the quote attachments.
- ⇒ Customer will be able to communicate with the sales representative using message section.
- ⇒ Using Browse button customer also able to attach file.
- ⇒ **Message History**: This section displays the conversation between customer and sales representative during the quote process.
- ⇒ **Shipping / Billing Address**: This field shows address entered by the customer at the time of quotation submit.

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Quotation Management from Admin:

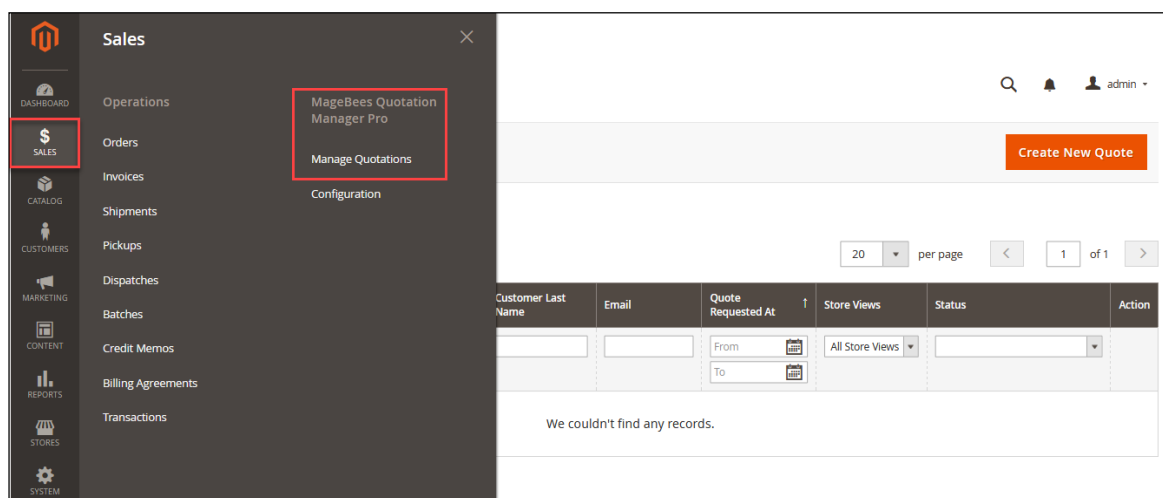
Notify for new Quotation: When admin login into the admin section then it will notify using notice if new quotation submitted by the customer or if any un-read read quotation available.



1) How to create new Quotation from the admin section?

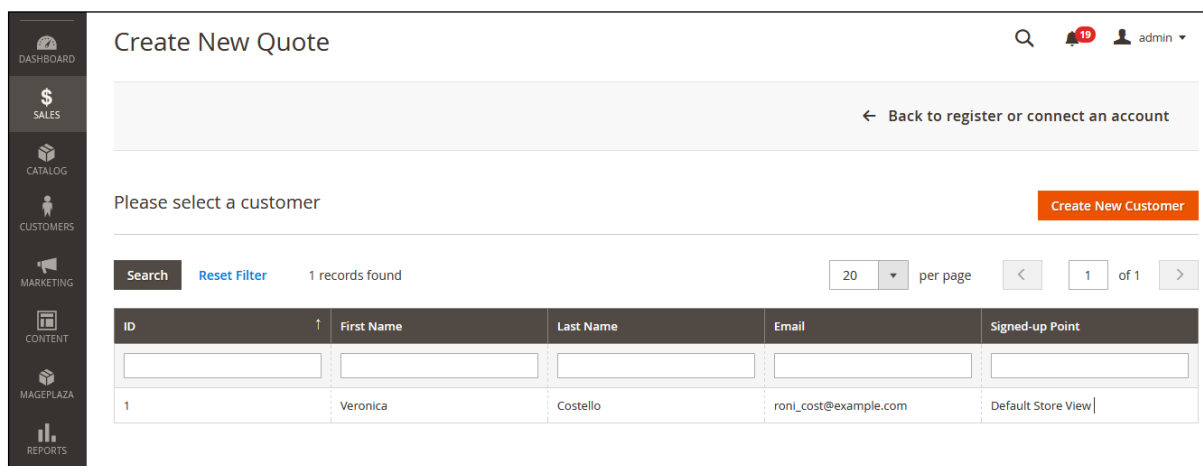
⇒ For create quotation from admin section you need to follow below steps.

- Login into admin section.
- Go to SALES -> Magebees Quotation Manager Pro -> Manage Quotations. You will get following screen.



- Click on **Create New Quote** button. You will get following screen.

Quotation Manager Pro Extension for Magento 2 By MageBees



- Select Customer the customer from grid or Click on “Create New Customer”. You will get following screen.



- Then Select the quote currency and store. You will get the following screen.

Quotation Manager Pro Extension for Magento 2 By MageBees

Create New Quote for Veronica Costello 🔍 🔔 19 admin ▾

← Back to register or connect an account Save Quote

Address Information

Billing Address

Select from existing customer addresses:
Add New Address ▾

Name Prefix

* First Name

Middle Name/Initial

* Last Name

Name Suffix

Company

* Street Address

* City

* Country
United States ▾

* State/Province
Please select ▾

* Zip/Postal Code

* Phone Number

Fax

VAT Number

[Validate VAT Number](#)

Save in address book

Shipping Address

Same As Billing Address

Select from existing customer addresses:
Add New Address ▾

Name Prefix

* First Name

Middle Name/Initial

* Last Name

Name Suffix

Company

* Street Address

* City

* Country
United States ▾

* State/Province
Please select ▾

* Zip/Postal Code

* Phone Number

Fax

VAT Number

[Validate VAT Number](#)

Save in address book

Quotation Manager Pro Extension for Magento 2 By MageBees

- Add the Shipping and Billing address for the quotation then click on “Save Quote” button. After that new quote generated and you will redirect to quote view page.
- Add the quote items in quote from this page by click on “Add Products” button.

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2) Edit Quotation from admin Section.

⇒ Go to SALES -> Magebees Quotation Manager Pro -> Manage Quotations. You will able to see list of all the available quotes as displayed in following screen. Then click on the View Quotation link for edit the selected quote.

The screenshot displays the 'Manage Quotations' interface. At the top right, there is a search icon, a notification bell with '1', and a user profile 'admin'. Below this is a 'Create New Quote' button. A search bar with 'Search' and 'Reset Filter' options is present. Below the search bar, it indicates '18 records found' and a pagination control showing '20 per page' and '1 of 1'. The main table has the following data:

ID	Quote Assign To	Customer First Name	Customer Last Name	Email	Quote Requested At	Store Views	Status	Action
magebeesQuote 35	admin	test	test	testing.cws@gmail.com	Jun 11, 2018 5:39:15 AM	Main Website Main Website Store Default Store View	PROPOSAL SENT ACTION CUSTOMER	View Quotation
magebeesQuote 34	admin	Veronica	Costello	roni_cost@example.com	Jun 11, 2018 4:33:39 AM	Main Website Main Website Store Default Store View	NEW REQUESTED	View Quotation
magebeesQuote 36	admin	Veronica	Costello	roni_cost@example.com	Jun 11, 2018 4:29:14 AM	Main Website Main Website Store Default Store View	NEW REQUESTED	View Quotation

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In quotation view page , quote related information like customer detail, quote items, tier price and quantities, billing and shipping address , message history section and editor for send message will be displayed.

Quote & Account Information Section

- ⇒ **Quote Created Date:** It will display the quote created date.
- ⇒ **Quote Updated Date:** It will display the quote updated date.
- ⇒ **Quote Status:** Admin will be able to change the Quote Status using this field.
- ⇒ **Expiry Date:** Admin will able to change the quote expiry date here.
- ⇒ **Quotation Assign To:** Admin will able to assign quote to another admin user.
- ⇒ **Quotation Requested From :** It will display the store name from which quote is generated.
- ⇒ **Remarks With Quote :** It will display the remarks with quote which is submit by customer when generate the quote.

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Account Information

⇒ This section display customer account information submits by the customer at the time of quotation submitted.

Add File To Quote

⇒ Admin will able to add file to quote using the browse button.

Quote Attachments

⇒ If any attachment added by the customer then it will also display in this section.

Address Information

Billing Address Edit	Shipping Address Edit
Veronica Costello 6146 Honey Bluff Parkway Calder, Michigan, 49628-7978 United States T: (555) 229-3326	Veronica Costello 6146 Honey Bluff Parkway Calder, Michigan, 49628-7978 United States T: (555) 229-3326
	Shipping Method
	Flat Rate
	<input checked="" type="radio"/> Fixed - \$25.00
	Best Way
	<input type="radio"/> Table Rate - \$0.00
	<input type="button" value="Refresh Shipping Rates"/>

Address Information

⇒ This section will be displayed Billing address and shipping address of the customer which is used by the customer when customer submitted the quote request. Here admin can edit the address

⇒ **Shipping Method** : This section display shipping method rate for quote items If available.

Quotation Manager Pro Extension for Magento 2 By MageBees

Product Information

⇒ This section displays all the available quote products with its selected options for this quote.

Add Products										
Product Name	Comment	Original Price	Cost Price	Price	Qty	Action	Row Total	Tax	Margin (GP)	Remove Item
Overnight Duffie SKU: 24-WB07		\$45.00	N/A Change	40	<input checked="" type="radio"/> 5	✓ ✕	\$200.00	\$0.00		
					<input type="radio"/> 1	✓ ✕	\$45.00	\$0.00		
					<input type="radio"/> 2	✓ ✕	\$84.00	\$0.00		
					ADD QTY					
Total 1 product(s)	Sub Total	\$225.00	\$0.00	---	---	---	\$200.00	\$0.00	---	

[Update Items and Quantities](#)

- **Product Name** : It will display Product information with its selected options.
- **Comment** : It will display customer comment and also admin will able to add\edit it's comment product wise.
- **Original Price**: It will display product's original price.
- **Cost Price**: Admin will be able to add product's cost price using change link. When you click on the change link then you will get text box then set your value and click on save action icon.
- **Price**: It will display product's actual price when quote submitted by the customer. Admin will able to change the price.
- **Qty**: It will display product's qty which is submitted by the customer. Admin will able to change Cost Price, Price & Qty field value. Admin will also able to tier qty set for the product using **ADD QTY** link.
- **Row Total**: It will display total row amount base on the product qty and its price.
- **Tax**: It will display the quote item tax amount.
- **Margin**: When admin will set Cost Price of the product then it will display Margin in the percentage.
- **Add Products**: By click on this button, it will open the product selector grid where you can select the product which you want to add to quote. After select the products click on **Add Selected Product(s) to Quote** button. It will add the selected products to quote.

Quotation Manager Pro Extension for Magento 2 By MageBees

- **Configure:** This button will display if quote product has assigned custom option or configurable option. By click on this button, popup will be open which will display the assigned product option you can edit the product option and default quantity from here. Click on **Update Items & Qty's** button for Update Items into quote.

Note: When you edit the Product's then it will be remove the entire tier Qty from all the products.

Quotation Totals

Quote Totals	
Subtotal Original	\$225.00
Adjustment Quotation	-\$25.00
Subtotal	\$200.00
Tax	\$0.00
Shipping & Handling	\$5.00
Grand Total	\$205.00
Submit Proposal	
Create Order	

- ⇒ **Subtotal Original** : It will show Quote item's total amount with product's original price .
- ⇒ **Adjustment Quotation**: It will show Quote item's discount amount .
- ⇒ **Subtotal**: It will show quote item's cost after adjust quote price .
- ⇒ **Tax**: It will show the quote item's tax amount.
- ⇒ **Shipping & Handling**: It will show the shipping and handling amount for quote items.
- ⇒ **Grand Total** : It will show Quote final cost with tax and shipping amount.
- ⇒ **Submit Proposal**: This button will used for submit generated proposal to the customer. So customer will access that generated quotation using their customer account.
- ⇒ **Create Order**: This button will used for create order using current quote information.

Quotation Manager Pro Extension for Magento 2 By MageBees

Message History:

This section list the communication between the client and admin / sales representatives.

Message History

2018-06-12 12:11:58 | PROPOSAL SENT ACTION STORE OWNER | By admin admin | System Message ▲

Customer Not Notified
Status Change From PROPOSAL SENT ACTION CUSTOMER To PROPOSAL SENT ACTION STORE OWNER
PROPOSAL SENT ACTION STORE OWNER

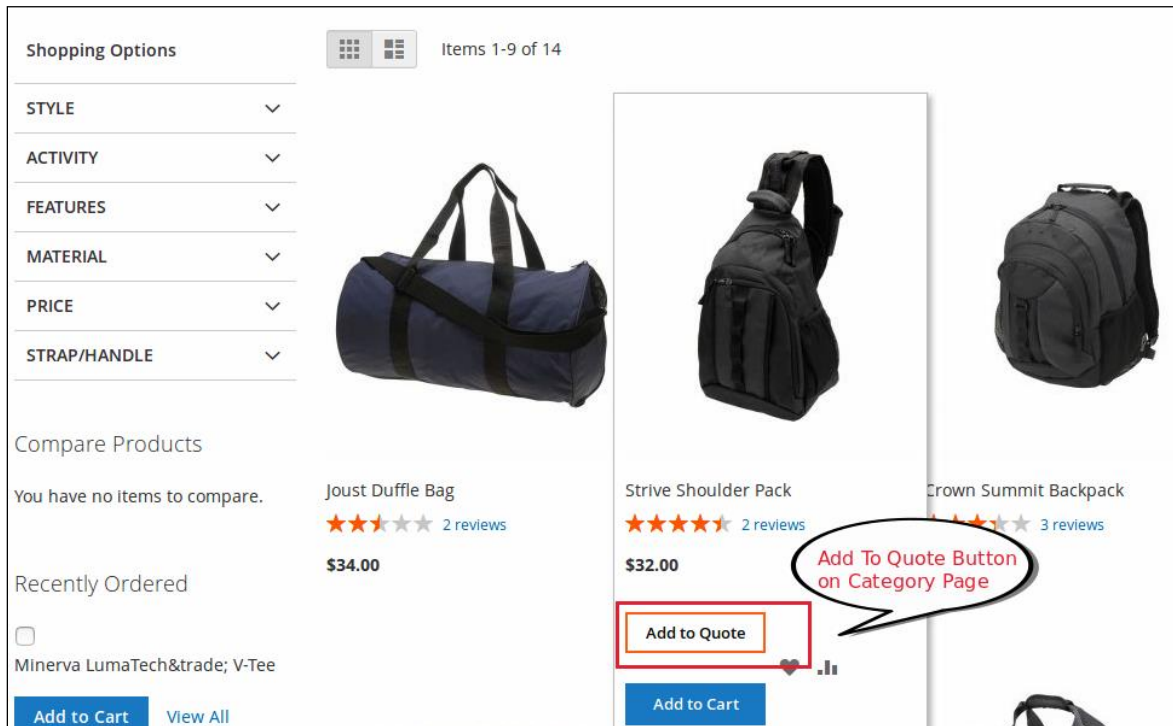
2018-06-11 12:16:50 | PROPOSAL SENT | By admin admin | System Message ▼

2018-06-11 12:11:15 | NEW REQUESTED | By admin admin | System Message ▼

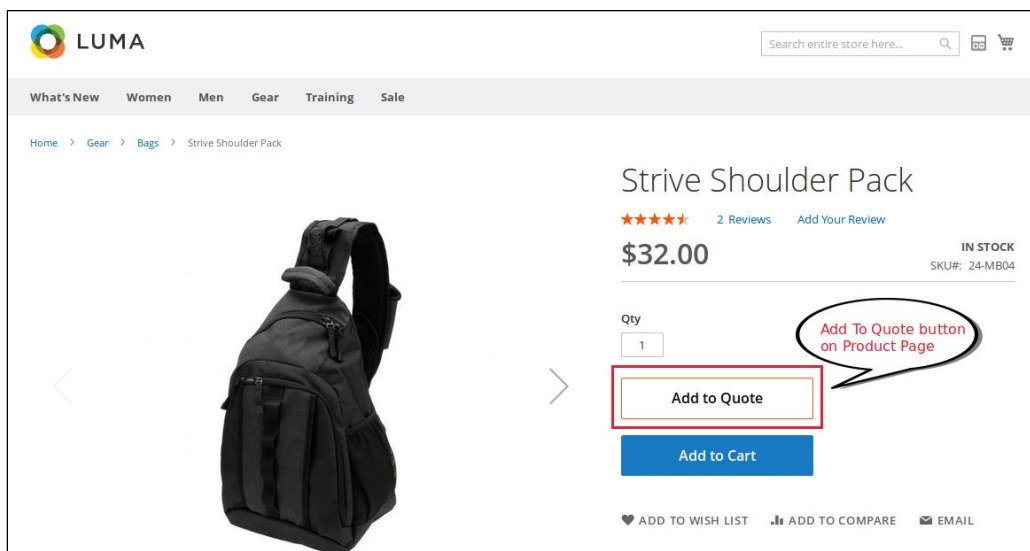
- ✓ It will show **date & time** information about individual communication message.
- ✓ When customer notified by admin then it will show as **Customer Notified**.
- ✓ It will show communication message which was written **by the admin / customer**.
- ✓ It will also list **Quote Status** in the communication section.

Frontend Snapshots:

➤ Add To Quote Button on Category Page

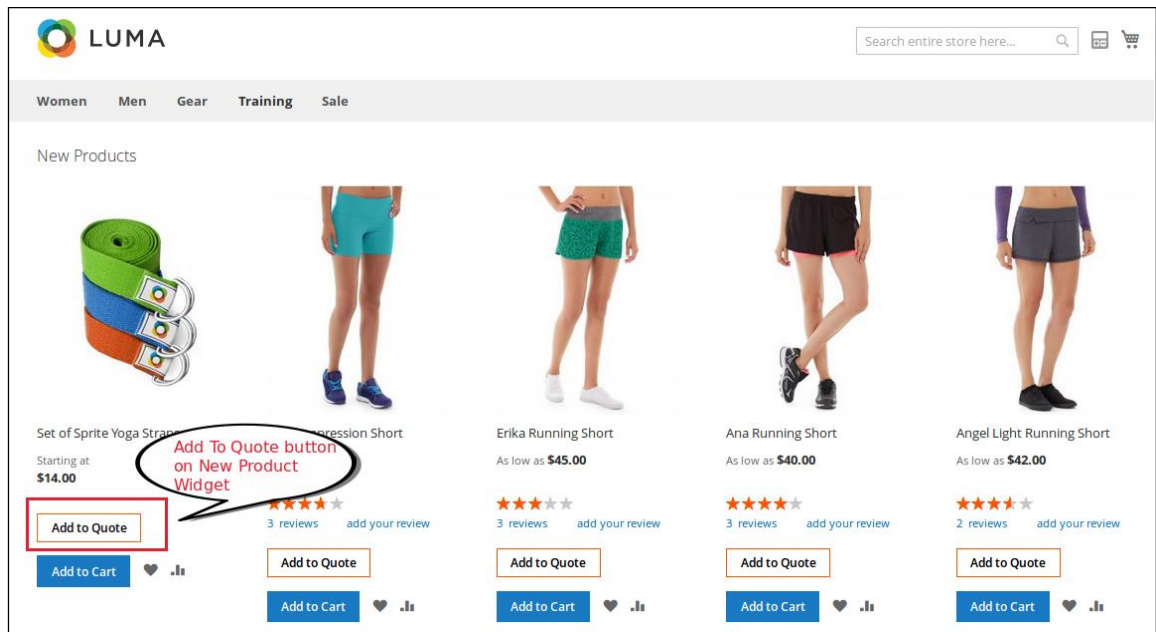


➤ Add To Quote Button on Product Page

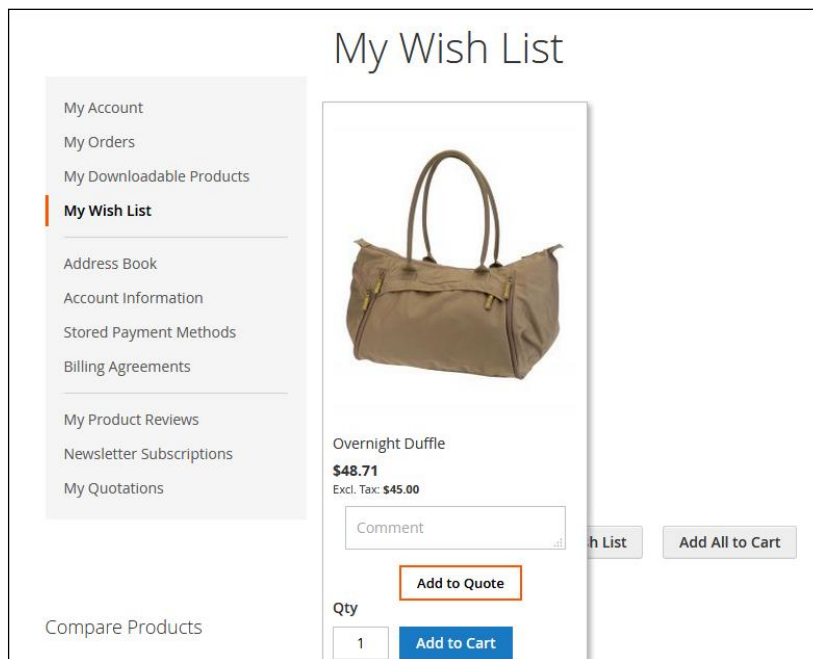


Quotation Manager Pro Extension for Magento 2 By MageBees

➤ Add To Quote Button on New Product Widget after apply Short code




➤ Add To Quote Button For Wishlist Product



➤ Add To Quote Button For Compare Product

Compare Products

[Print This Page](#)



Endeavor Daytrip Backpack

★★★★☆ 3 Reviews

\$35.72
Excl. Tax: \$33.00

[Add to Quote](#)

[Add to Cart](#)

SKU	24-WB06
Description	<p>With more room than it appears, the Endeavor Daytrip Backpack will hold a whole day's worth of books, binders and gym clothes. The spacious main compartment includes a dedicated laptop sleeve. Two other compartments offer extra storage space.</p> <ul style="list-style-type: none">• Foam-padded adjustable shoulder straps.• 900D polyester.• Oversized zippers.• Locker loop.
Activity	Gym, Hiking, School, Urban

Quotation Manager Pro Extension for Magento 2 By MageBees

FAQs

Q-1: I have tried to install Quotation Manager Pro extension using terminal, but I am not able to install using command line, what are steps for custom installation of Quotation Manager Pro extension??

Solution:

Please [contact us](#) for install our module in your store.

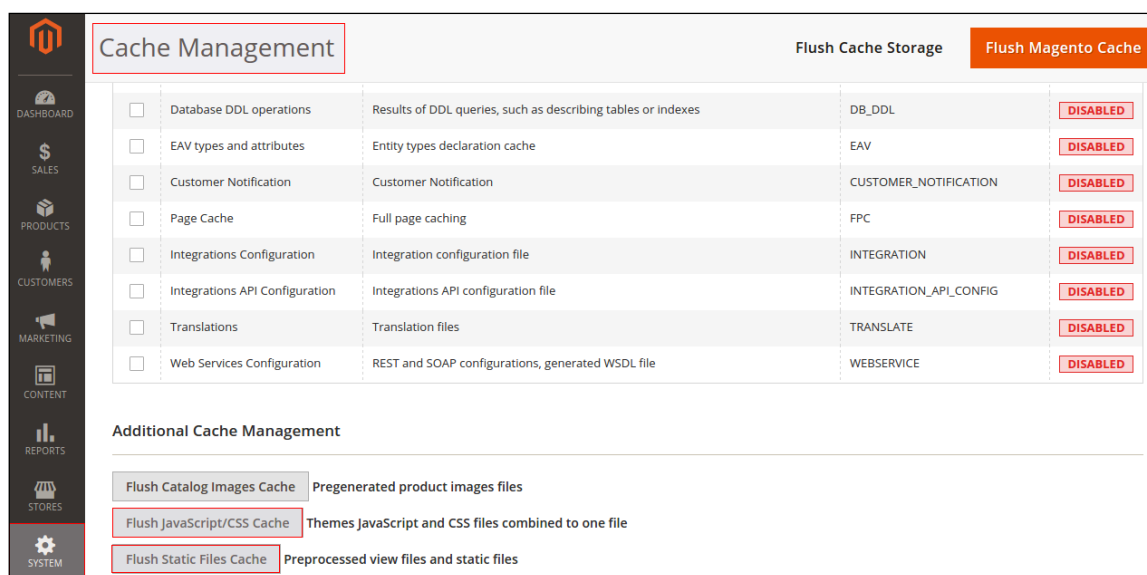
Q-2: I am getting error in console for magebeesQuote.js not found in frontend, How to solve this problem?

OR

I am getting error in console for manageQuote.js not found in backend, How to solve this problem?

Solution-1:

1. Go to admin -> SYSTEM-> Cache Management. You can see following screen.



2. Click on Flush JavaScript/Css Cache and Flush Static Files Cache Button
3. Refresh the page in Frontend.

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Solution-2:

1) Open command prompt / terminal and change directory to your magento install directory.

2) Run following command :

```
rm -R pub/static/*
```

```
php bin/magento setup:static-content:deploy
```

```
php bin/magento cache:flush
```

```
php bin/magento cache:clean
```

Q-3: Can I send notification email to more than one sales representative?

Solution:

Yes you can provide list of comma separated email address in "Send Quote Email Copy To". So those email address will be notified of each notifications.

Email Notification Settings

Quote Email Sender [store view]

Send Quote Email Copy To [store view]
Comma-separated



Quotation Manager Pro Extension for Magento 2 By MageBees

Q-4: Not able to add/update/delete cart item after confirm and checkout quotation. It will give error like display in below screen.

Shopping Cart

✖ Action is blocked due to quotation proposal is locked

⚠ To update item in the Shopping cart log out from Quotation confirmation mode.

Item	Price	Qty	Subtotal
 Erika Running Short-32-Red	\$45.00	1	\$45.00
 Erika Running Short Size: 30 Color: Purple	\$45.00	2	\$90.00

Summary

Estimate Shipping and Tax

Subtotal	\$135.00
Shipping (Flat Rate - Fixed)	\$15.00
Tax	\$11.14
Order Total	\$161.14

[Proceed to Checkout](#)

[Check Out with Multiple Addresses](#)

[Move to Wishlist](#)

Solution:

First check the configuration settings for Front End Settings.

Front End Settings

Apply Add to Quote Button To (store view) All Products
Apply Add to Quote button for all products or apply for specific product using 'Apply Add to Quote' attribute.

Display Button on Category Page (store view) Yes
Select Yes for display "Add To Quote" button on category page.

Display Button on Product Detail Page (store view) Yes
Select Yes for display "Add To Quote" button on product detail page.

Enable Tier Price Option (store view) Yes
Select Yes for enable tier price option.

Product Remark Info (store view) Yes
Select Yes for enable product remark info.

Lock Proposal (store view) Yes
Proposal items cannot be removed or added from quote via the shopping cart.

If currently customer had accepted the proposal and If "Lock Proposal" is set to yes then

Quotation Manager Pro Extension for Magento 2 By MageBees

customer not able to add/update/delete the current cart items. So for add/update/delete cart items click on log out link.

For disable Lock Proposal set the configuration setting for “Lock Proposal ” to No.

Q-5: Can I display “Add To Quote” Button on widget product list template or custom product list template?

Solution:

Yes, you can add the “Add To Quote” button in widget product list template or custom product list template. For that you have to add below mention short code in your template file above the “product-item-actions” div.

```
<?php echo $block->getLayout()->createBlock('Magento\Framework\View\Element\Template')->setProduct($_item)->setTemplate('Magebees_QuotationManagerPro::quote_button.phtml')->toHtml();?>
```

Check below screen in which short code for **Add To Quote** button is added.

```
<div class="product-item-inner">

<?php echo $block->getLayout()->createBlock("Magento\Framework\View\Element\Template")->setProduct(
$_product)->setTemplate("Magebees_QuotationManagerPro::quote_button.phtml")->toHtml();?>

<div class="product actions product-item-actions"= strpos($pos, $viewMode . '-actions') ?
$position : '' ?&gt;&gt;
    &lt;div class="actions-primary"<?= strpos($pos, $viewMode . '-primary') ? $position : '' ?&gt;&gt;
        &lt;?php if ($_product-&gt;isSaleable()): ?&gt;
            &lt;?php $postParams = $block-&gt;getAddToCartPostParams($_product); ?&gt;
            &lt;form data-role="tocart-form" data-product-sku="<?= $block-&gt;escapeHtml($_product-&gt;
getSku()) ?&gt;" action="<?= /* @NoEscape */ $postParams['action'] ?&gt;" method="post"&gt;
                &lt;input type="hidden" name="product" value="<?= /* @escapeNotVerified */
$postParams['data']['product'] ?&gt;"&gt;
                &lt;input type="hidden" name="<?= /* @escapeNotVerified */ Action::
PARAM_NAME_URL_ENCODED ?&gt;" value="<?= /* @escapeNotVerified */ $postParams['data'
][Action::PARAM_NAME_URL_ENCODED] ?&gt;"&gt;
                &lt;?=$block-&gt;getBlockHtml('formkey') ?&gt;
                &lt;button type="submit"
                    title="<?= $block-&gt;escapeHtml(__('Add to Cart')) ?&gt;"
                    class="action tocart primary"&gt;
                    &lt;span&gt;<?= /* @escapeNotVerified */ __('Add to Cart') ?&gt;&lt;/span&gt;
                &lt;/button&gt;
            &lt;/form&gt;</pre
```

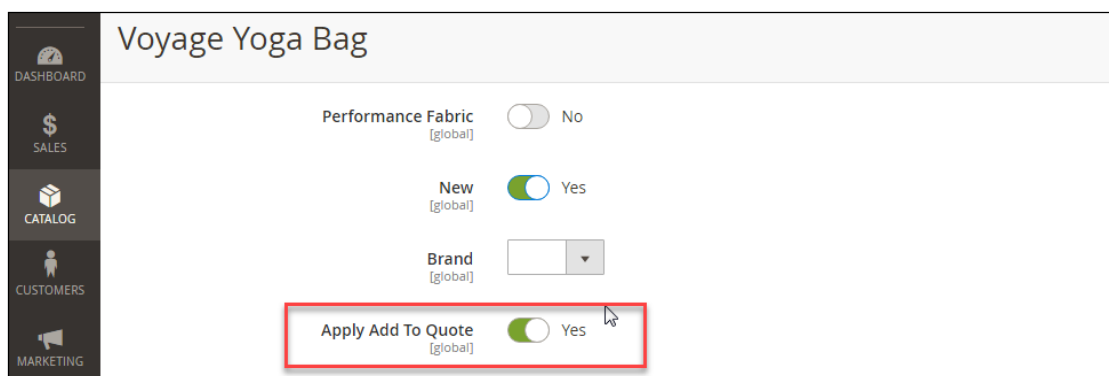
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Q-6: How Can I allow Add to Quote button only for specific products using “Apply Add To Quote” attribute ?

Solution:

When you installed Quotation Manager Pro Extension in your store, this extension automatically create an attribute call “**Apply Add To Quote**”.

- ⇒ Go To CATALOG ->Products.
- ⇒ Edit the product in which you want to enable/disable Add To Quote Button. You will get following screen.



NOTE: If configuration option “**Apply Add To Quote Button**” value set to ‘**Product in which "Apply Add To Quote" attribute applied**’ then enable/disable Add To Quote Button for each product functionality will work otherwise Add To Quote button will be displayed for all products.

Q-7: Why Out of Stock Product’s options not display on product detail page even if “Enable Manage Stock for Quote” is set to “No” ?

Solution:

If “Enable Manage Stock for Quote” is set to “No” then out of stock product option will not display in product detail page. With this feature we are only allow to quote a product even if product quantity is not available when quote the product. Out of stock product’s option will manage with default magento’s manage stock functionality.

Quotation Manager Pro Extension for Magento 2 By MageBees

Q-8: Why Quote Item Tax is not displaying in quote even after “Include Product Tax in Quote” is set to Yes ?

Solution:

Quote item tax will be displayed only if “Display Product Prices In Catalog” is set to “Including Tax” or “Including and Excluding Tax” from Stores-> Configuration ->SALES -> Tax ->Price Display Settings -> Display Product Prices In Catalog.

Q-9: Why the ‘Proceed To Checkout’ button is not visible on quote view page in frontend?

Solution:

Check the configuration settings for ‘**Allow Customer Checkout On Quote**’, It is set to NO then “Proceed To Checkout” button will not display on quote view page in frontend. If ‘**Allow Customer Checkout On Quote**’ is set to Yes and still button not display then check if proposal sent by admin or not, if proposal is not send by admin then ‘Proceed To Checkout’ will not display.

Q-10: How the guest customer can proceed to checkout the quote?

Solution:

From the Quote Proposal mail, Guest customer can proceed to checkout by clicking on the button ‘Proceed To Checkout’ in mail If ‘**Allow Customer Checkout On Quote**’ is set to Yes.

Thank you!

Do you need Extension Support? Please create support ticket for quick reply,

<https://support.magebees.com/>

Do you have any suggestions? Please contact us,

<https://www.magebees.com/contact-us>