

REQUEST FOR QUOTE USER GUIDE

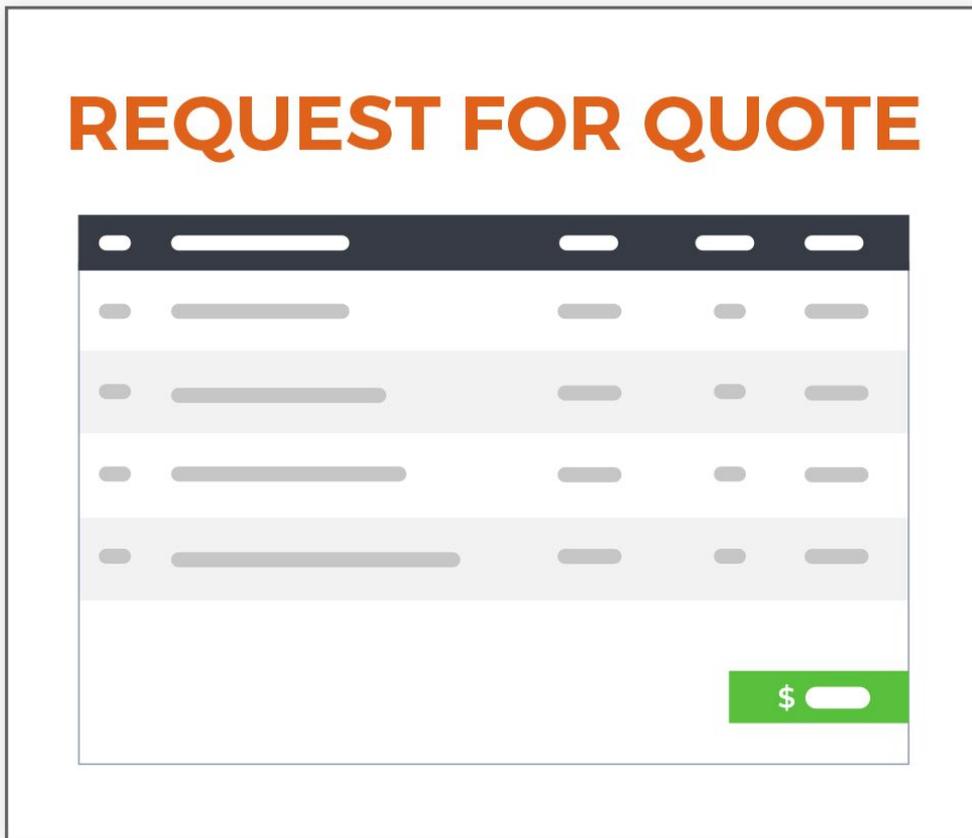


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Overview

Quotes are essential when the customer wants to negotiate the prices for bulk purchase of products. Zestard's Request For Quote(RFQ) extension helps you to better communicate with customers when you want to exchange quotes over bulk orders.

The Quote process is as simple as adding products to Quote Cart and sending the request to admin for further process. Each time a customer submits a Request For Quote, both the admin and the customer are notified by email and then admin or sales team can review the requested cart items and communicate with customers accordingly.

When the prices remain confidential you're able to provide order specific quotes to your customers which helps to build healthy relations with your customers. Our extension allows customers to send a request for quote for single as well as multiple products at the same time. Once received quotes admin and customer can check for the prices/update the price and after confirmation can finalize the price for all the products. Merchant has the rights to cancel, update and approve the quotes of customer and each time the quote gets updated both admin & customer is notified via email.

Our extension helps Merchant Improve customer interaction and collect qualified leads by facilitating them to quickly ask for products quote. The premium features of the extension helps you display the 'Add to Quote' option on selected categories and product detail page so that customers can easily request for quote.

The extension allows admin to choose for which group of customers and for which store they want to enable 'Add to Quote' button and based on the settings button will be visible at the front side. Admin can set the days after which the quote will expire if the quote is not approved or rejected.

With email settings, you can keep the admin and customers well informed about changes to the requests. Request For Quote extension keeps track of the entire negotiation history made for all the quotes so admin/customer can check the history easily for a specific quote. Our extension also provides the feature to directly add the quote products to cart once the approval is done by admin.

Main Features

- Hassel Free Quote Submission.
- Customer can submit multiple products for quote in just one go.
- Just like how you add products to cart, customers can add products to Quote Minicart for which quotation is to be sent.
- Must have extension for B2B looking to form long-term relationships by showing there is negotiation room on pricing.
- Restrict Customer Groups from backend for Quote Requests.
- Choose whether to show or hide the "Add to Quote" button on the specific product and category page.
- Restrict Quote Requests by Store from backend.
- Comments section available for customers to enter any specific notes on specific Quote requested.
- Customers can access all the quote requests from their accounts
- User-friendly interface for customers to apply for the quote.

- Keeps track of entire negotiation history made between admin and customer.
- Customer can easily convert quotes to order once finalized.
- Create quotes in one click from product or category pages.
- Efficiently manage all requests received from customers within the Magento backend.
- Negotiate over the prices in a convenient way and maintain price logs for future reference.
- Secure and easy communication with the customers and also notify using email for each edit made to particular quote.
- Quote gets expired after the number of days specified by the admin if the quote is not approved/rejected.
- Customer receives notification in email if their quote is getting expired.
- Improves overall user experience by giving customers a room to buy products in bulk.

Reasons to choose Zestard’s Request For Quote?

Show Quote button for specific categories	Show Quote button for specific customer groups	Easily add products to quote cart
View history of all quotes sent	Set Emails for confirmation, updates, cancellation & approval of quote	Set reminders for Quote Expiration email to customers
Track full history of quote communication	Easily convert quotes to order	User friendly interface to apply for the quote

Installation Guide

Once you have purchased & downloaded our extension follow below steps to Install the extension. The easiest way to install a Magento 2 extension is using SFTP or FTP. To do this first, download our RFQ module and follow the below steps.

In short, for Professionals or Techie Person

1. Unzip the extension.
2. Login to your root directory via FTP or SFTP.
3. Go to the below path in your remote directory app/code/
4. Create folder Zestardtech and under that create subdirectory Rfq.
5. Now upload all the unzipped code into Rfq folder.
6. Then open your SSH or Terminal.
7. Go to your root folder and RUN below 4 commands step by steps:
 - `php bin/magento setup:upgrade`
 - `php bin/magento setup:di:compile`
 - `php bin/magento setup:static-content:deploy -f`
 - `php bin/magento cache:clean`
8. If you didn't get any error during the commands execution process then our extension is successfully installed in your store.

To Note: If you face any error during this process then please either share the screenshots or share credentials of your store at our email id support@zestard.com and will help you install the extension properly.

Detailed Installation Instructions

Step 1: Connect to FTP and upload the unzipped extension folder.

- Connect to your site using FTP or SFTP. Go to the remote directory /app/code.
- Create folder Zestardtech and under that create subdirectory Rfq and upload the unzipped code into this folder.

Step 2: Run Commands

- Open your SSH or Terminal.
- Go to your root folder and RUN below 4 commands step by steps:
 - php bin/magento setup:upgrade

```
[root@103 magento221]# php bin/magento setup:upgrade
Cache cleared successfully
File system cleanup:
/home/idoideo/public_html/magento221/generated/code/Composer
/home/idoideo/public_html/magento221/generated/code/Magento
/home/idoideo/public_html/magento221/generated/code/Shopial
/home/idoideo/public_html/magento221/generated/code/Symfony
/home/idoideo/public_html/magento221/generated/code/Zestardtech
/home/idoideo/public_html/magento221/generated/metadata/adminhtml.php
/home/idoideo/public_html/magento221/generated/metadata/crontab.php
/home/idoideo/public_html/magento221/generated/metadata/frontend.php
/home/idoideo/public_html/magento221/generated/metadata/global.php
/home/idoideo/public_html/magento221/generated/metadata/webapi_rest.php
/home/idoideo/public_html/magento221/generated/metadata/webapi_soap.php
/home/idoideo/public_html/magento221/pub/static/adminhtml
/home/idoideo/public_html/magento221/pub/static/declared_version.txt
/home/idoideo/public_html/magento221/pub/static/frontend
/home/idoideo/public_html/magento221/var/view_preprocessed/pub
```

- php bin/magento setup:di:compile

```
[root@103 magento212]# php bin/magento setup:di:compile
Compilation was started.
```

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

```
[root@103 magento221]# php bin/magento setup:static-content:deploy -f
Deploy using quick strategy
frontend/Magento/blank/en_US          500/2088      =====>----- 23% %    3 secs
█
```

- php bin/magento cache:clean

```
[root@103 magento221]# php bin/magento cache:clean
Cleaned cache types:
config
layout
block_html
collections
reflection
db_ddl
eav
customer_notification
full_page
config_integration
config_integration_api
translate
config_webservice
```

- If you didn't get any error during the commands execution process then our extension is successfully installed in your store.

Step 3: To confirm Installation and activation.

- To complete the installation you need to log out of your Magento Admin and login back.
- Open your SSH or Terminal and run this command 'php bin/magento module:status Zestardtech_Rfq' and if you get Output as Module is enabled then our extension is installed properly in your store.
- You can also check by navigating to **Stores → Configuration**, and if you see the extension tab 'Rfq' under 'Zestardtech', then our extension is installed properly in your store.

To Note: If you face any error during this process then please either share the screenshots or share credentials of your store at our email id support@zestard.com and will help you install the extension properly.

User Guide

How to Configure Request for Quote Extension?

1. Goto Stores → Configurations → Zestard Technologies → Request for Quote.
 - **Rfq Enable:** Select “Yes” to enable the extension.
 - **Display "Add to Quote" button on Product Page:** Select “Yes” if you want to display the "Add To Quote" button on the product detail page.
 - **Display "Add to Quote" button on Category Page:** Select “Yes” if you want to display the "Add To Quote" button on the category page.
 - **Allow Quotation for Categories:** From here Admin can choose for which category/categories products they want to allow the customer to request for quote.
 - **Allow Quote Request for Customer Groups:** Allows admin to choose which customer group can request for quote for the specified products.
 - **Allow Quote Request for Store View:** Allows admin to choose from which store(s) customers can request for quote.
 - **Quote Expiration:** You can set after how many days the quote will get expired once created and approved.
 - **Send Reminder Email before Day(s):** Admin can set before how many days of the expiration of quote customer should get notified via mail.

Goto Stores → Configurations → Zestard Technologies → Request for Quote.

Configuration Store View: Default: Config Save Config

ZESTARD TECHNOLOGIES

- Request for Quote
- GENERAL
- CATALOG
- SECURITY
- CUSTOMERS
- SALES
- ENGAGEMENT CLOUD
- SERVICES
- ADVANCED

General

Support only simple and configurable products

Rfq Enable [global] Yes

Display "Add to Quote" button on Product Page [global] Yes

Display "Add to Quote" button on Category Page [global] Yes

Allow Quotation for Categories [global]

- All --
- Default Category
- Gear
- Bags
- Fitness Equipment
- Watches
- New Luma Yoga Collection
- Training
- Video Download
- Men

Select "Yes" if you want to display the "Add To Quote" button on the product detail page.

Select "Yes" to enable the extension.

From here Admin can choose for which category/categories products they want to allow the customer to request for quote

Select "Yes" if you want to display the "Add To Quote" button on the category page.

'Add to Quote' button will be shh product list and product page.

Allow Quote Request for Customer Groups [global]

Allows admin to choose which customer group can request for quote for the specified products

General
Wholesale
Retailer

Allow Quote Request for Store View [global]

Allows admin to choose from which store(s) customers can request for quote

Main Website
Main Website Store
Default Store View

Expiration and Reminder

Quote Expiration [global] 30

Set default period in days for quote to be valid once approved. For zero and higher this value can be set for each quote individually. Keep empty to disable this feature.

Send Reminder Email before Day(s) [global] 7

Set default period in days to send reminder once quote approved. For zero and higher this value can be set for each quote individually. Keep empty to disable reminder.

Admin can set before how many days of the expiration of quote customer should get notified via mail.

You can set after how many days the quote will get expired once created and approved

2. Admin Notifications and Customer Notification -

- **Admin Email Address:** Set the email address in which you want to receive emails for a request for quote.
- **Email Template to Notify Admin:** Set the template in which you want to get notified via emails.
- **Email Sender:** Default email address which will be used to send mails to the customers.
- **Email Template for Submitted Quote:** Select the Email template which will be used while sending the quote success email to customers.
- **Email Template for Approved Quote:** Select the Email template which will be used while sending the quote approval email from admin to customers.
- **Email Template for Modified Quote:** Select the Email template which will be used while sending the quote modification/update email to customers.
- **Email Template for Canceled Quote:** Select the Email template which will be used while sending the quote cancellation email to customers.
- **Email Template for Expired Quote:** Select the Email template which will be used while sending the quote expiration email to customers.
- **Email Template for Reminder:** Select the Email template which will be used while sending the quote expiration reminder email to customers.

Admin Notifications

Admin Email Address [global] johndoe@example.com
Input an email address, the extension will send notifications

Email Template to Notify Admin [global] Admin Notification (Default) ▼

Customer Notification

Email Sender [global] General Contact ▼

Email Template for Submitted Quote [global] Submitted Quote Customer Notification (Default) ▼

Set the template in which you want to get notified via emails (points to Admin Template)

Set the email address in which you want to receive emails for request for quote (points to Admin Email Address)

Select the Email template which will be used while sending the quote success email to customers (points to Customer Template)

Default email address which will be used to send mails to the customers (points to Customer Email Sender)

Select the Email template which will be used while sending the quote modification/update email to customers

Select the Email template which will be used while sending the quote cancellation email to customers

Select the Email template which will be used while sending the quote approval email from admin to customers.

Customer Notification

Email Template for Approved Quote [global] Approved Quote Customer Notification (Default) ▼

Email Template for Modified Quote [global] Modified Quote Customer Notification (Default) ▼

Email Template for Canceled Quote [global] Canceled Quote Customer Notification (Default) ▼

Email Template for Expired Quote [global] Expired Quote Customer Notification (Default) ▼

Email Template for Reminder [global] Reminder Quote Customer Notification (Default) ▼

Select the Email template which will be used while sending the quote cancellation email to customers

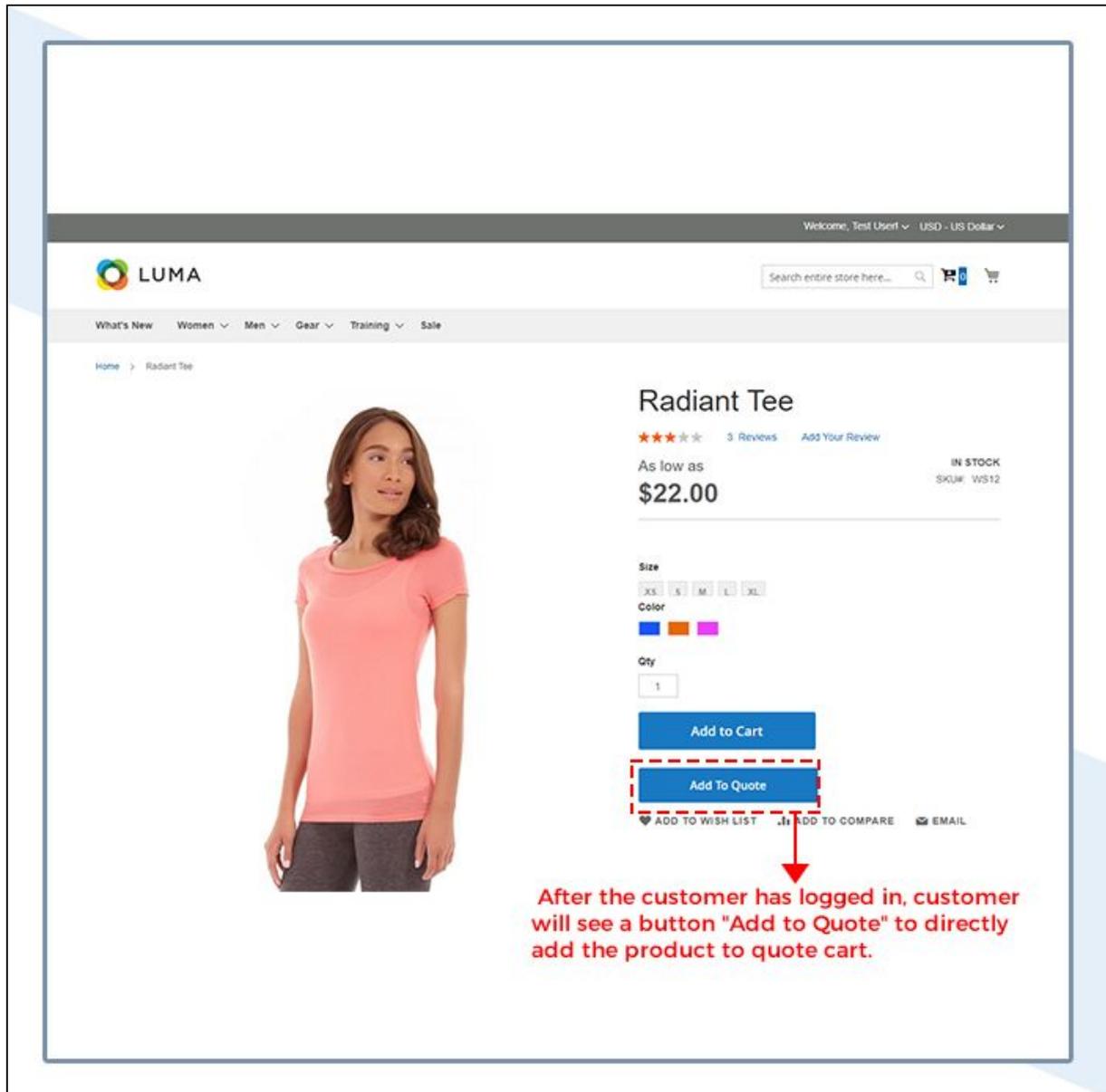
Select the Email template which will be used while sending the quote expiration reminder email to customers

3. If the customer is not logged in, the link will be shown on the product page for customers to log in before requesting the quote.

The screenshot displays the LUMA website interface for the 'Argus All-Weather Tank'. The product page includes a navigation bar with 'LUMA' and a search bar. The product details section shows the name 'Argus All-Weather Tank', a price of '\$22.00', and an 'Add to Cart' button. A red dashed box highlights a link that says 'Login To Quote For The Product'. Below this link, there are options for 'ADD TO WISH LIST', 'ADD TO COMPARE', and 'EMAIL'. A red arrow points from the text box below to the highlighted link.

If the customer is not logged in, link will be shown on the product page for customers to login before requesting for the quote

4. After the customer has logged in, the customer will see a button "Add to Quote" to directly add the product to quote cart.



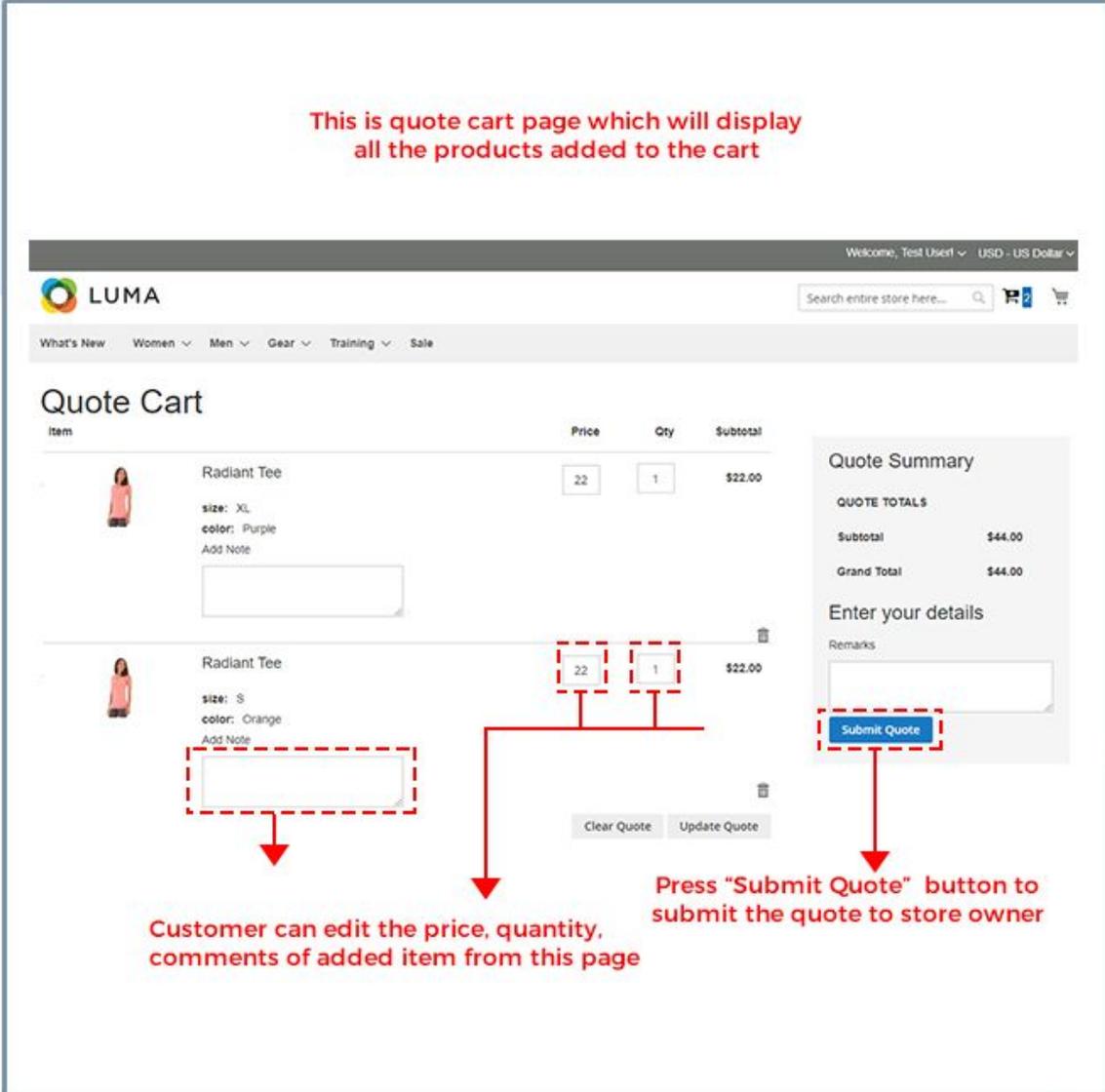
5. "Add to Quote" button on the category page to directly request for a quote from the category page itself.
6. Like Magento default shopping mini cart our extension displays a quote mini cart beside the shopping mini cart where all the products added to the quote cart will be displayed.



7. This is the quote cart page which will display all the products added to the cart. Customer can edit the price, quantity, comments of added item from this page.

Press the “Submit Quote” button to submit the quote to the store owner.

This is quote cart page which will display all the products added to the cart



Item	Price	Qty	Subtotal
 Radiant Tee size: XL color: Purple Add Note	22	1	\$22.00
 Radiant Tee size: S color: Orange Add Note	22	1	\$22.00

Quote Summary

QUOTE TOTALS

Subtotal	\$44.00
Grand Total	\$44.00

Enter your details

Remarks

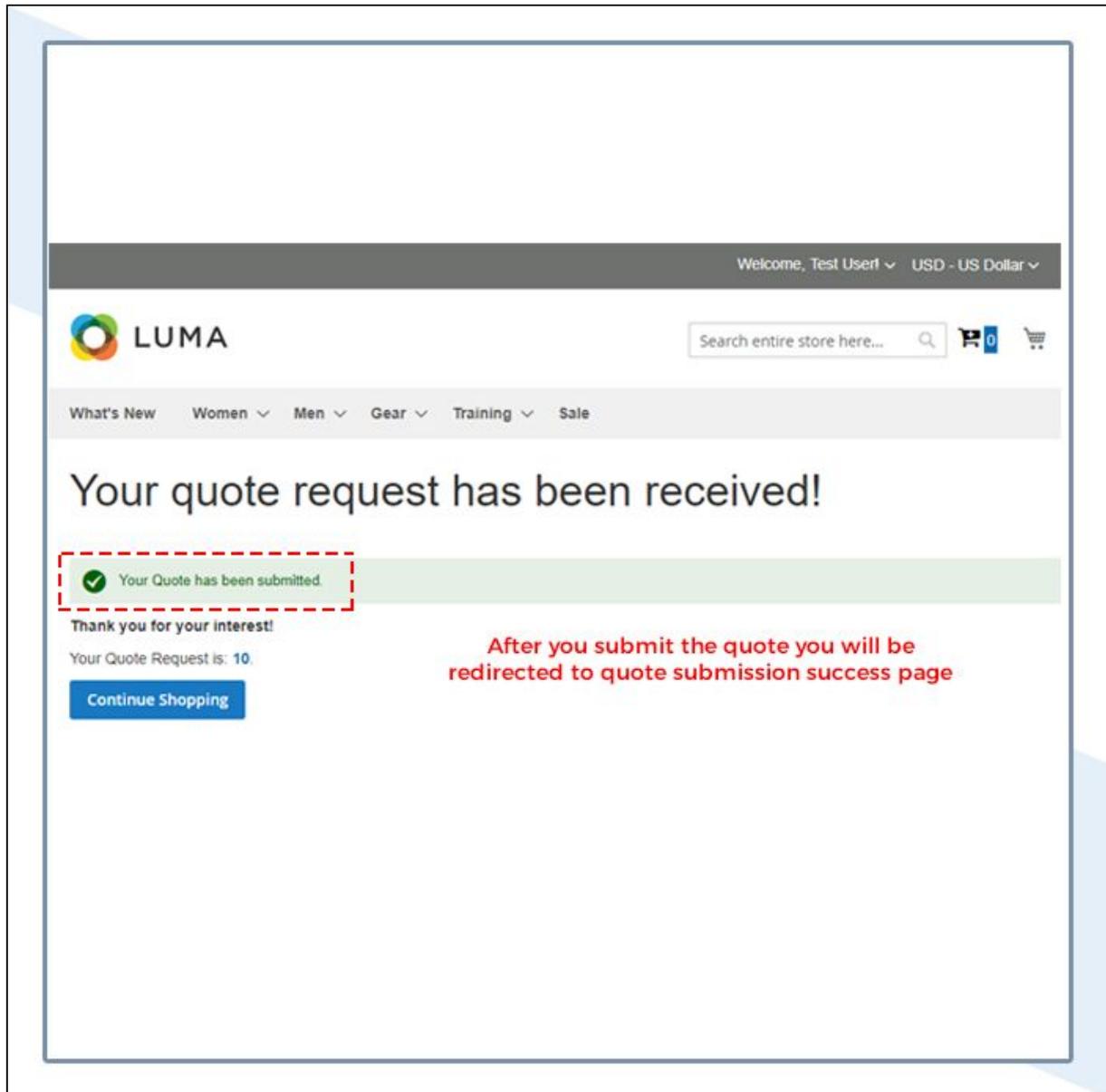
Submit Quote

Clear Quote Update Quote

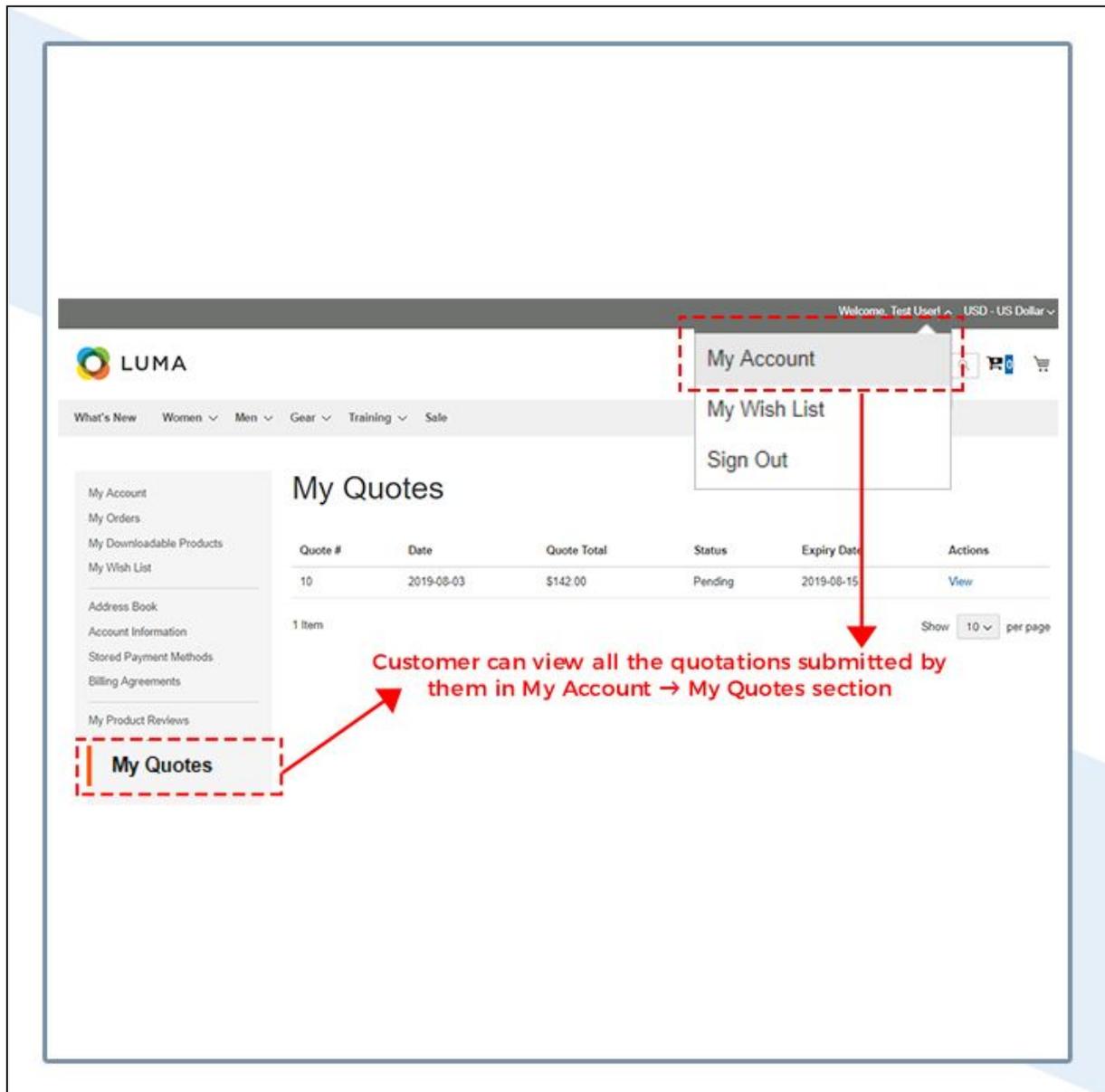
Customer can edit the price, quantity, comments of added item from this page

Press “Submit Quote” button to submit the quote to store owner

8. After you submit the quote you will be redirected to quote submission success page.



9. Customer can view all the quotations submitted by them in My Account → My Quotes section.

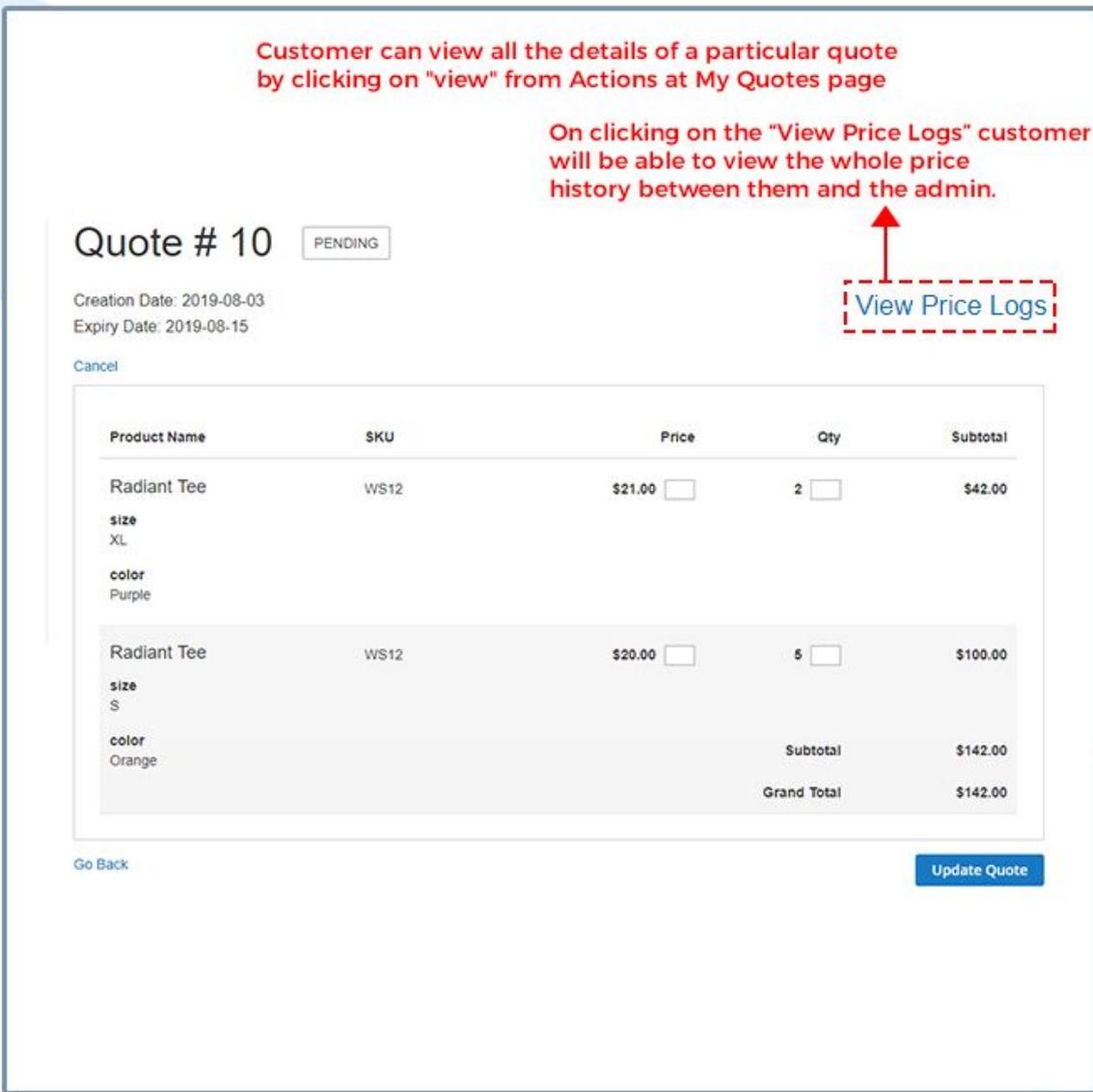


10. Customer can view all the details of a particular quote by clicking on "view" from Actions at My Quotes page.

View Price Logs: On clicking on the "View Price Logs" customer will be able to view the whole price history between them and the admin.

Customer can view all the details of a particular quote by clicking on "view" from Actions at My Quotes page

On clicking on the "View Price Logs" customer will be able to view the whole price history between them and the admin.



Quote # 10 PENDING

Creation Date: 2019-08-03
Expiry Date: 2019-08-15

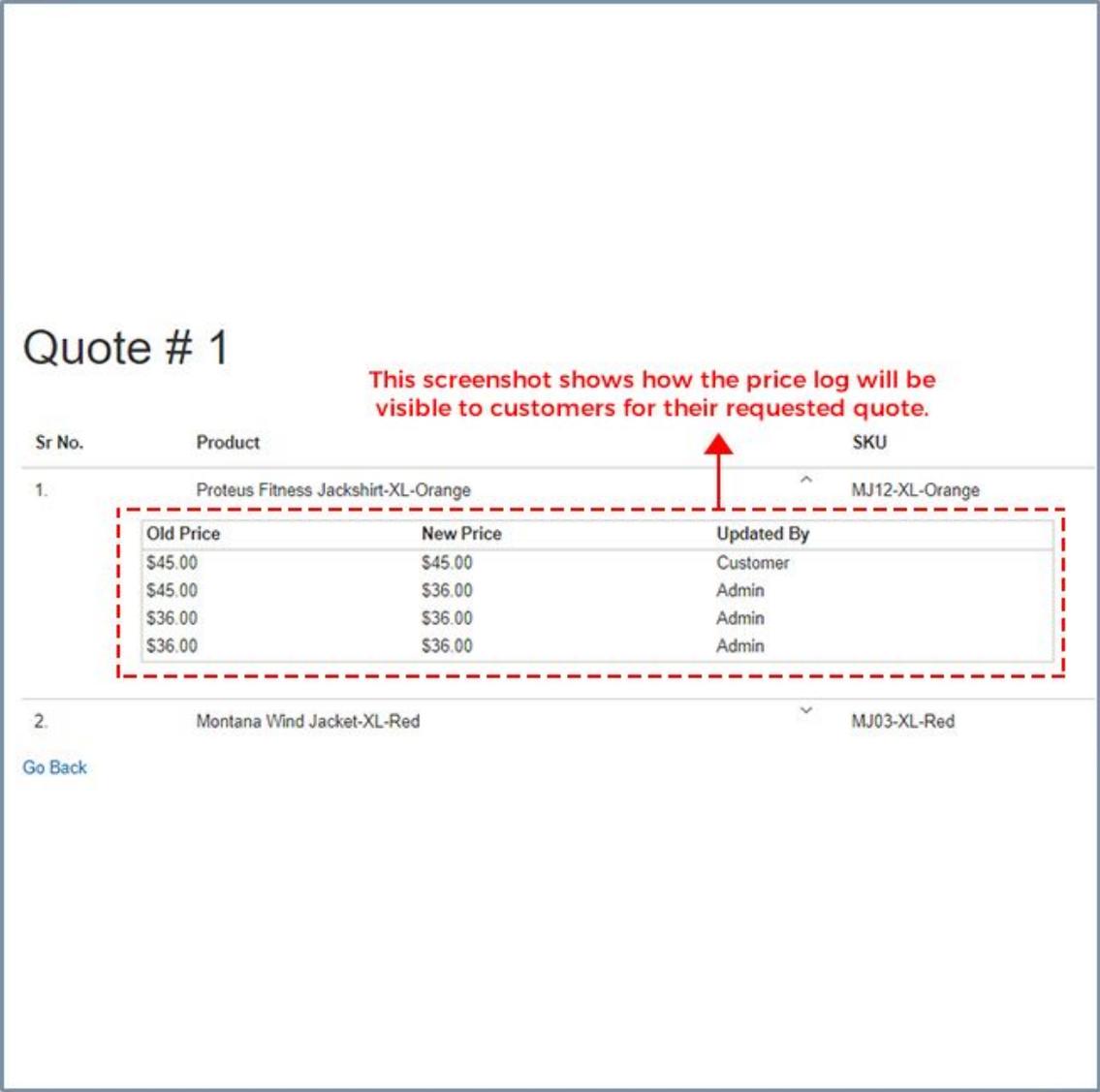
[Cancel](#)

Product Name	SKU	Price	Qty	Subtotal
Radiant Tee size XL color Purple	WS12	\$21.00 <input type="checkbox"/>	2 <input type="checkbox"/>	\$42.00
Radiant Tee size S color Orange	WS12	\$20.00 <input type="checkbox"/>	5 <input type="checkbox"/>	\$100.00
			Subtotal	\$142.00
			Grand Total	\$142.00

[Go Back](#) [Update Quote](#)

[View Price Logs](#)

11. This screenshot shows how the price log will be visible to customers for their requested quote.



Quote # 1

This screenshot shows how the price log will be visible to customers for their requested quote.

Sr No.	Product	SKU															
1.	Proteus Fitness Jackshirt-XL-Orange	MJ12-XL-Orange															
<table border="1"><thead><tr><th>Old Price</th><th>New Price</th><th>Updated By</th></tr></thead><tbody><tr><td>\$45.00</td><td>\$45.00</td><td>Customer</td></tr><tr><td>\$45.00</td><td>\$36.00</td><td>Admin</td></tr><tr><td>\$36.00</td><td>\$36.00</td><td>Admin</td></tr><tr><td>\$36.00</td><td>\$36.00</td><td>Admin</td></tr></tbody></table>			Old Price	New Price	Updated By	\$45.00	\$45.00	Customer	\$45.00	\$36.00	Admin	\$36.00	\$36.00	Admin	\$36.00	\$36.00	Admin
Old Price	New Price	Updated By															
\$45.00	\$45.00	Customer															
\$45.00	\$36.00	Admin															
\$36.00	\$36.00	Admin															
\$36.00	\$36.00	Admin															
2.	Montana Wind Jacket-XL-Red	MJ03-XL-Red															

[Go Back](#)

12. After the admin approves the quote the status will be changed to "Approved".

Once the quote is approved customer can see the two buttons at the bottom to directly move the approved quote to cart.

After the admin approves the quote the status will be changed to "Approved"

Quote # 10 **APPROVED**

Creation Date: 2019-08-03
Expiry Date: 2019-08-15 [View Price Logs](#)

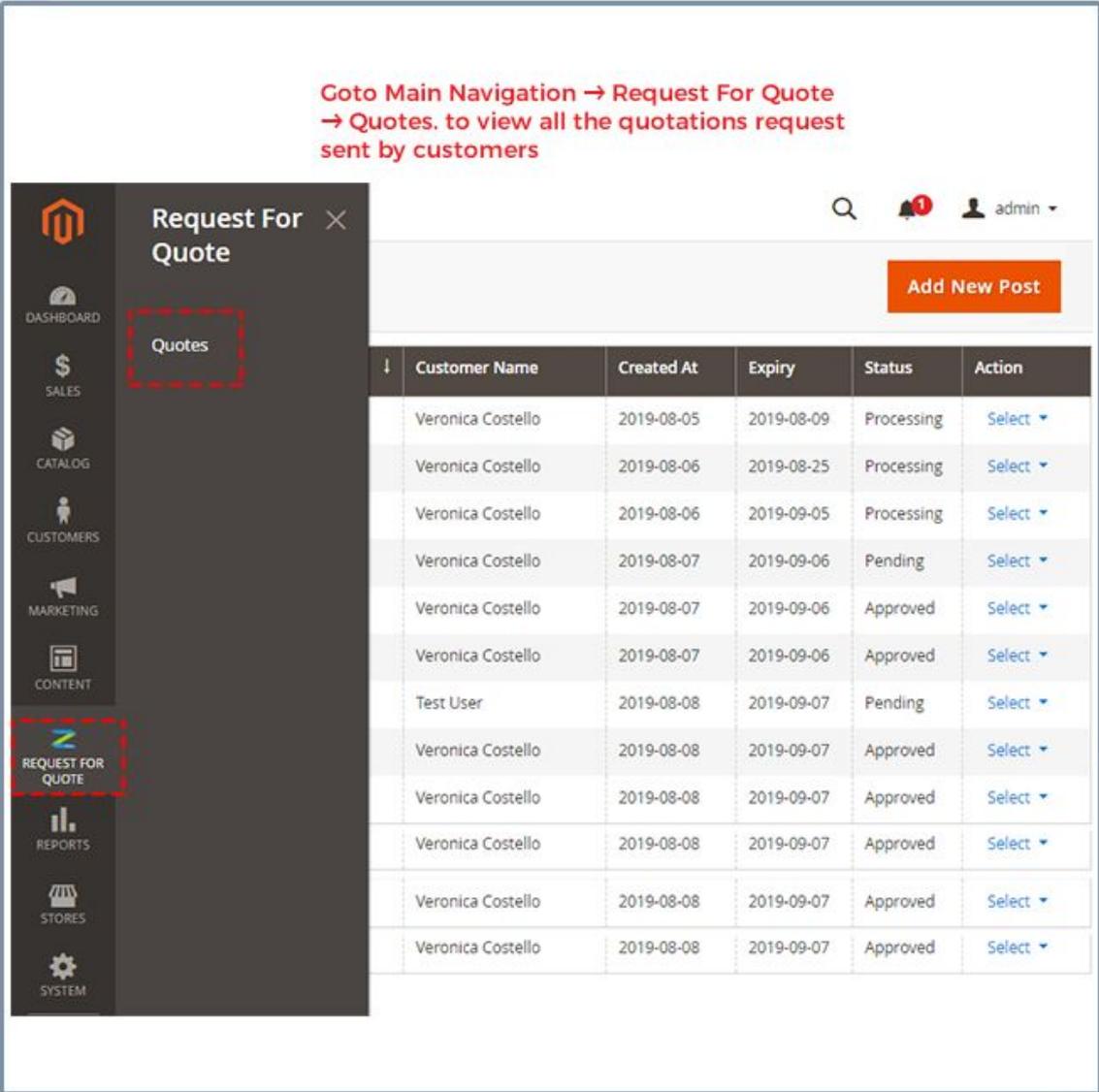
Product Name	SKU	Price	Qty	Subtotal
Radiant Tee size XL color Purple	WS12	\$21.00	2	\$42.00
Radiant Tee size S color Orange	WS12	\$21.00	5	\$105.00
			Subtotal	\$147.00
			Grand Total	\$147.00

Move to Shopping Cart **Move to Checkout**

Once the quote is approved customer can see the two buttons at the bottom to directly move the approved quote to cart

13. Goto Main Navigation → Request For Quote → Quotes to view all the quotations request sent by customers.

Goto Main Navigation → Request For Quote → Quotes. to view all the quotations request sent by customers



Customer Name	Created At	Expiry	Status	Action
Veronica Costello	2019-08-05	2019-08-09	Processing	Select
Veronica Costello	2019-08-06	2019-08-25	Processing	Select
Veronica Costello	2019-08-06	2019-09-05	Processing	Select
Veronica Costello	2019-08-07	2019-09-06	Pending	Select
Veronica Costello	2019-08-07	2019-09-06	Approved	Select
Veronica Costello	2019-08-07	2019-09-06	Approved	Select
Test User	2019-08-08	2019-09-07	Pending	Select
Veronica Costello	2019-08-08	2019-09-07	Approved	Select
Veronica Costello	2019-08-08	2019-09-07	Approved	Select
Veronica Costello	2019-08-08	2019-09-07	Approved	Select
Veronica Costello	2019-08-08	2019-09-07	Approved	Select
Veronica Costello	2019-08-08	2019-09-07	Approved	Select

14.Admin can view, update, cancel or approve the quote from this page.

Admin can view,update, cancel or approve the quote from this page

Edit Quote

🔍 🔔 👤 admin

← Back
Cancel / Close
Update Quote
Approve

QUOTE VIEW

Quote Info

Quote Price Log

Quote & Account Information

Quote # 10

Quote Date	Aug 2, 2019, 5:00:00 PM
Quote Status	Pending
Quote Expiry Date	2019-08-15 <input type="text" value="dd-mm-yyyy"/>
Quote Reminder Date	2019-08-13

Account Information [Edit Customer](#)

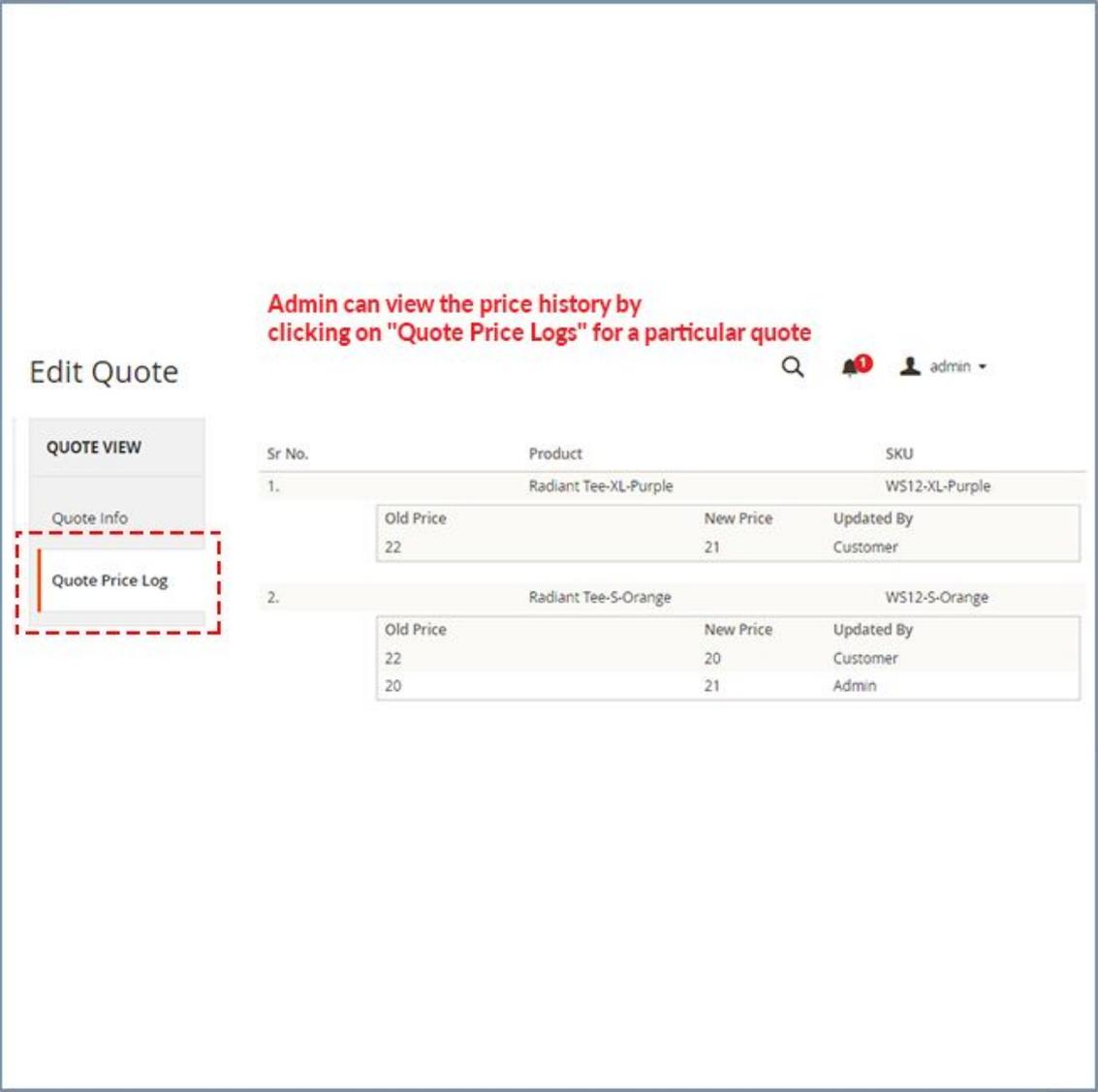
Customer Name	Test User
Email	ruser@mailinator.com

Item Id	Product	Original Price	New Price	Quantity	SubTotal
11	Radiant Tee	22.0000	21 <input type="text"/>	2	42
12	Radiant Tee	22.0000	20 <input type="text"/>	5	100

QUOTE TOTALS

Subtotal	142
Grand Total	142

15.Admin can view the price history by clicking on "Quote Price Logs" for a particular quote.



Admin can view the price history by clicking on "Quote Price Logs" for a particular quote

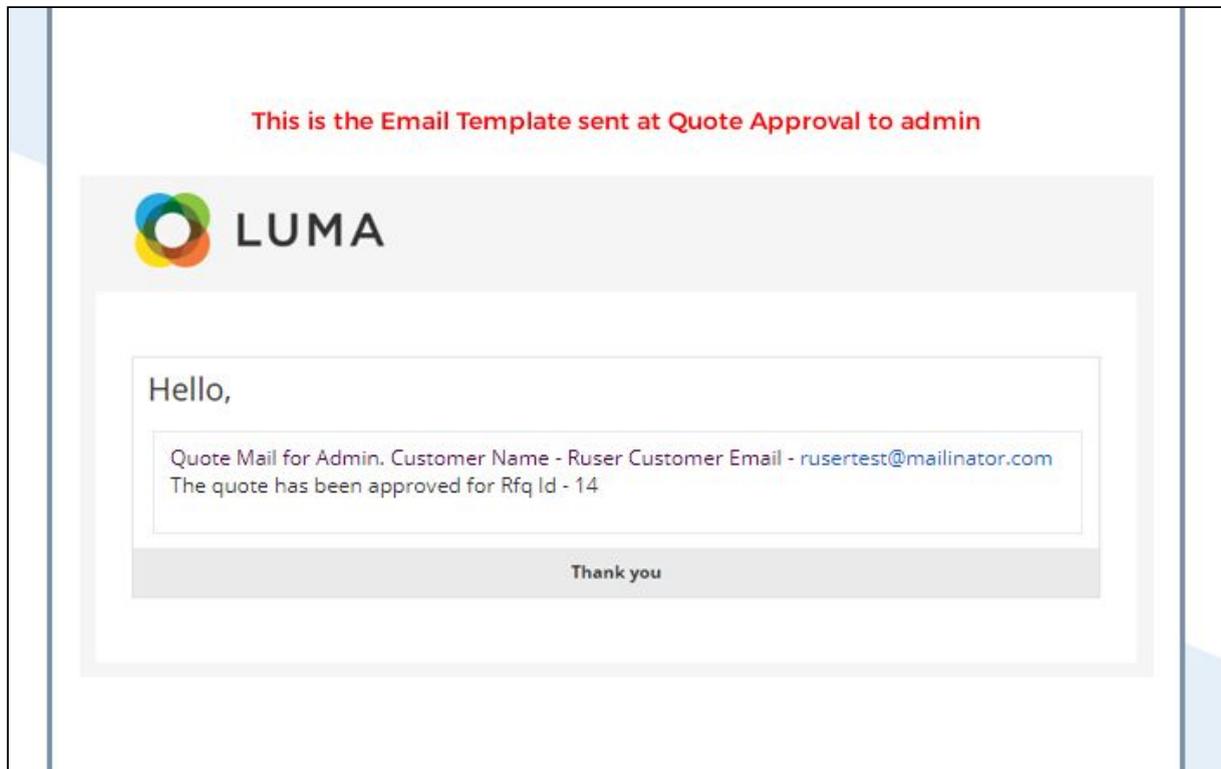
Search 🔍 | Notifications 🔔 1 | User: admin ▾

Edit Quote

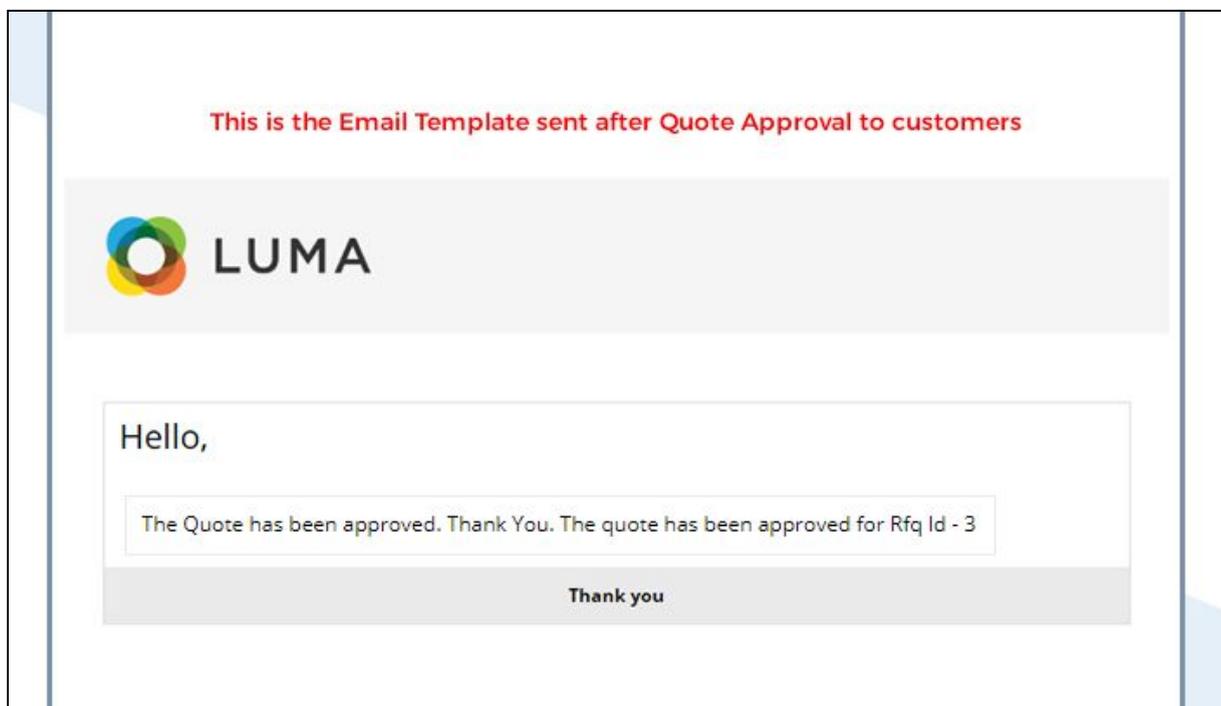
- QUOTE VIEW
- Quote Info
- Quote Price Log**

Sr No.	Product	SKU	
1.	Radiant Tee-XL-Purple	WS12-XL-Purple	
	Old Price	New Price	Updated By
	22	21	Customer
2.	Radiant Tee-S-Orange	WS12-S-Orange	
	Old Price	New Price	Updated By
	22	20	Customer
	20	21	Admin

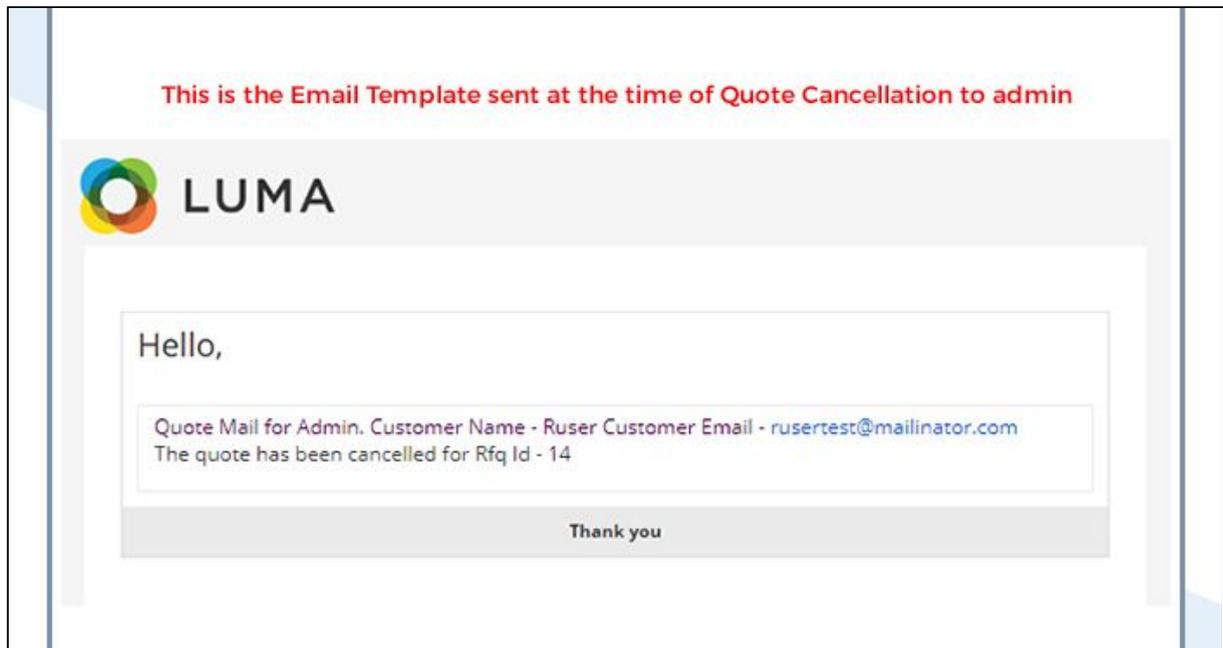
16. This is the Email Template sent at Quote Approval to admin.



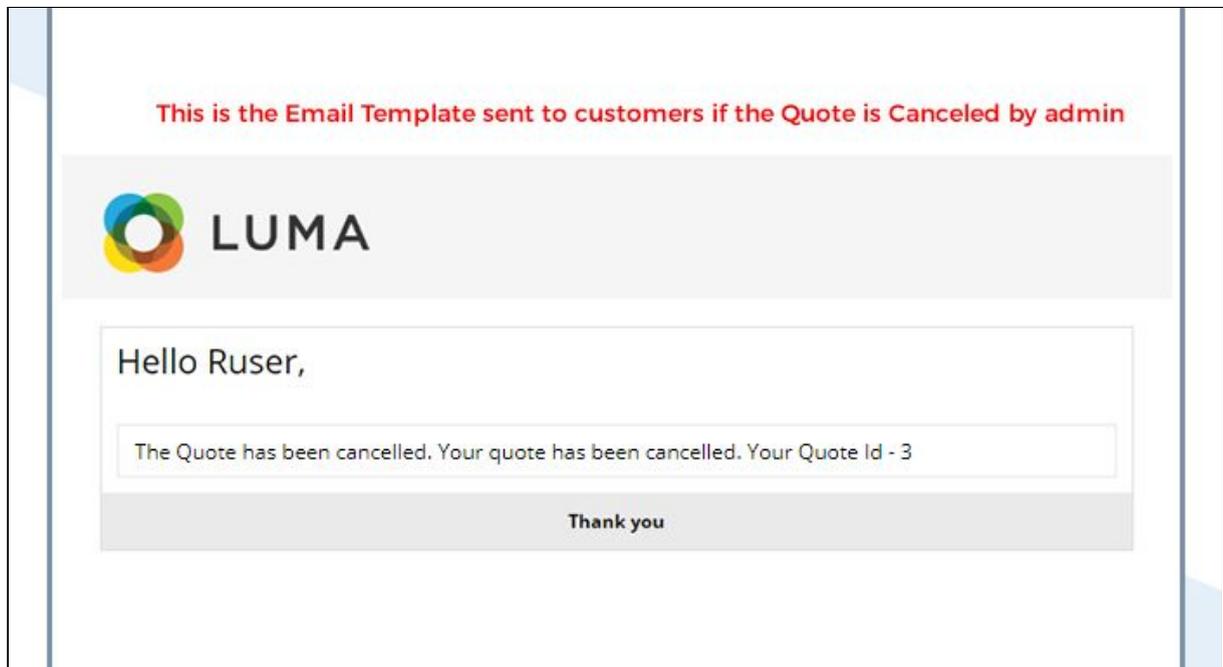
17. This is the Email Template sent after Quote Approval to customers.



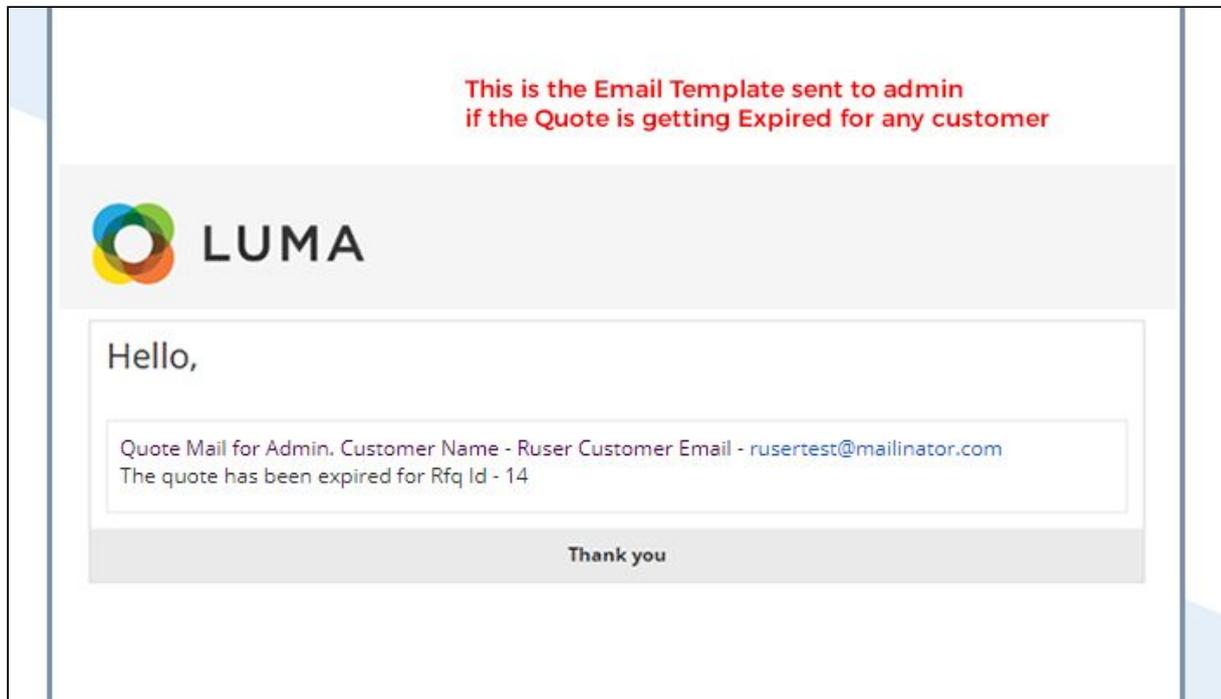
18.This is the Email Template sent at the time of Quote Cancellation to admin.



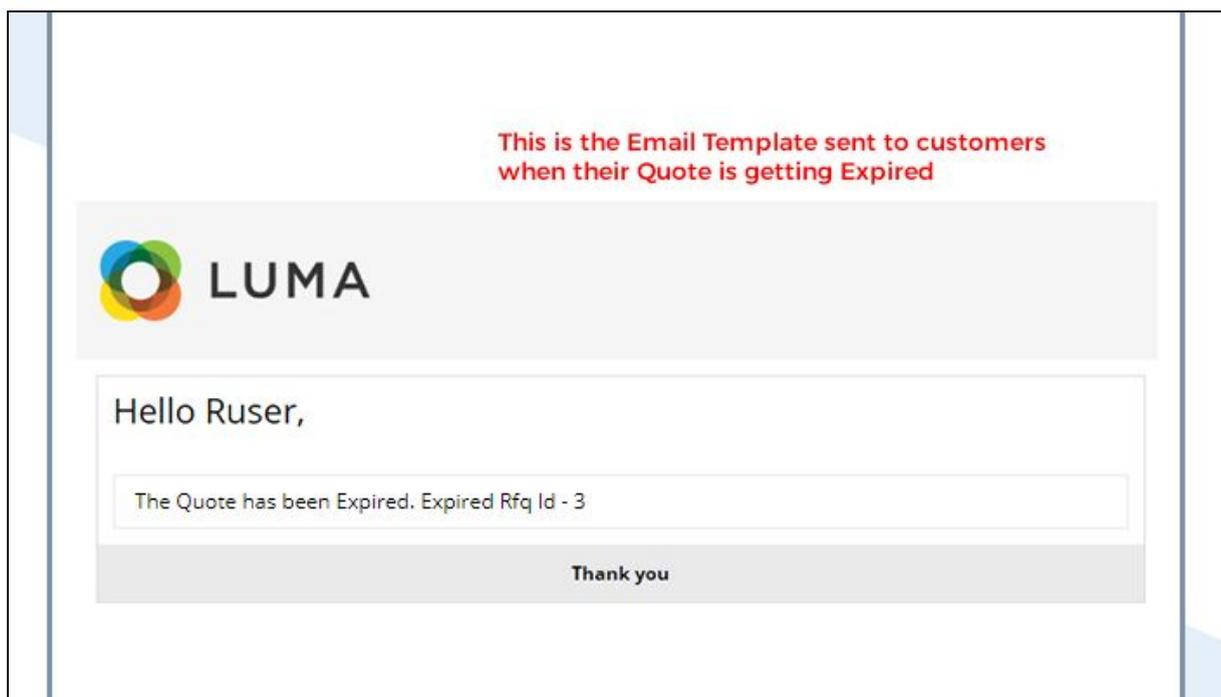
19.This is the Email Template sent to customers if the Quote is Canceled by admin.



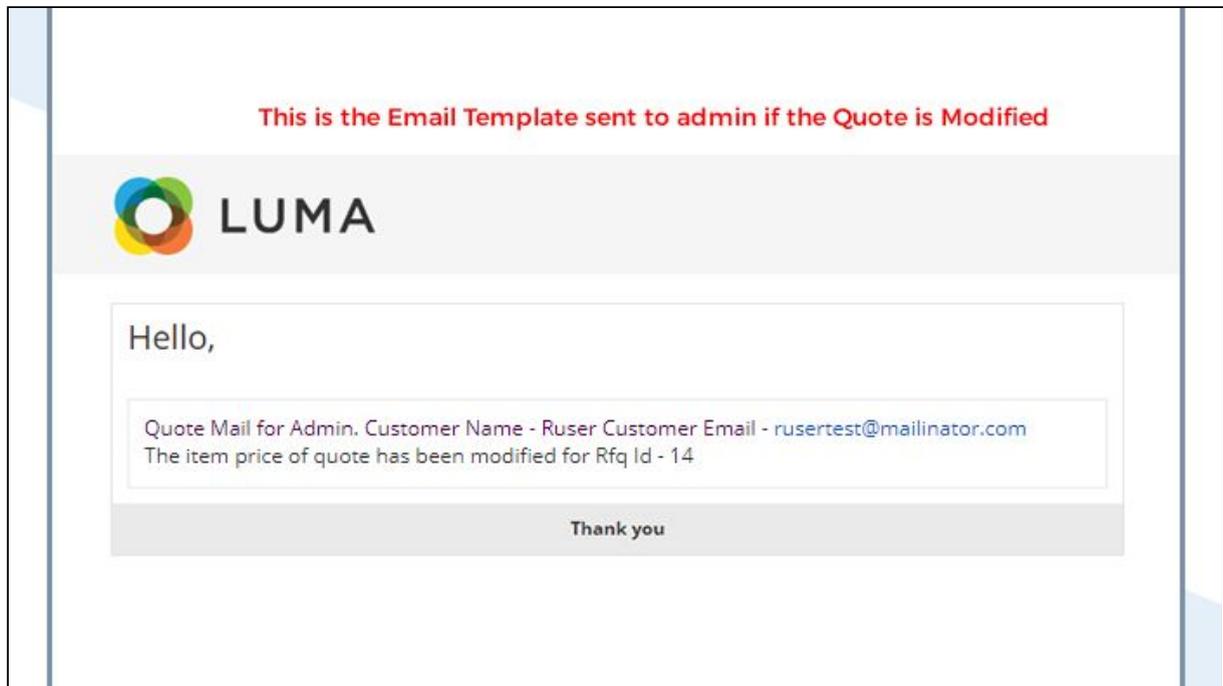
20. This is the Email Template sent to admin if the Quote is getting Expired for any customer.



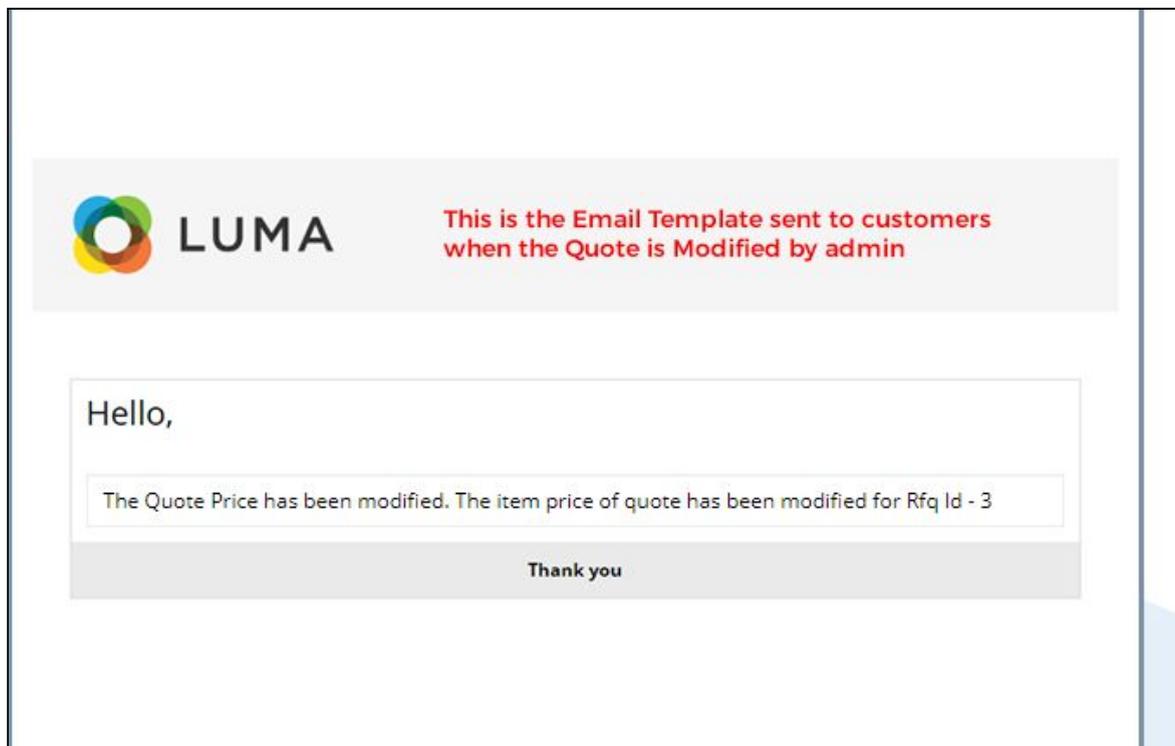
21. This is the Email Template sent to customers when their Quote is getting Expired.



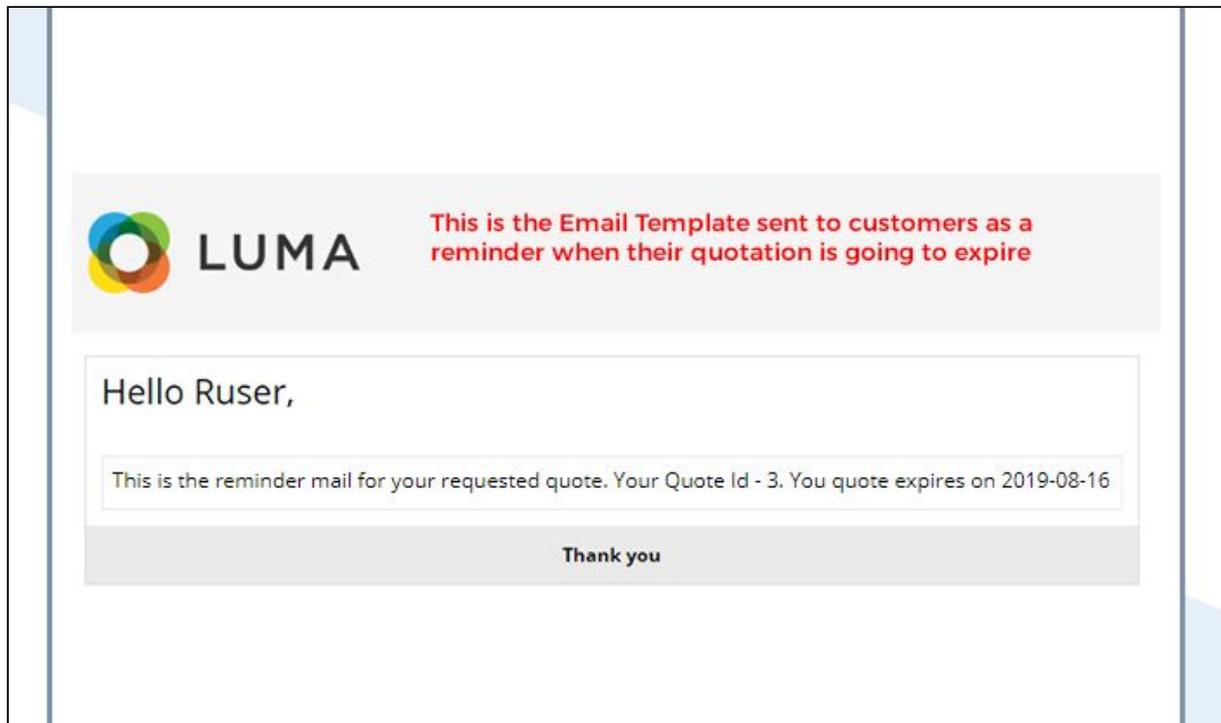
22. This is the Email Template sent to admin if the Quote is Modified.



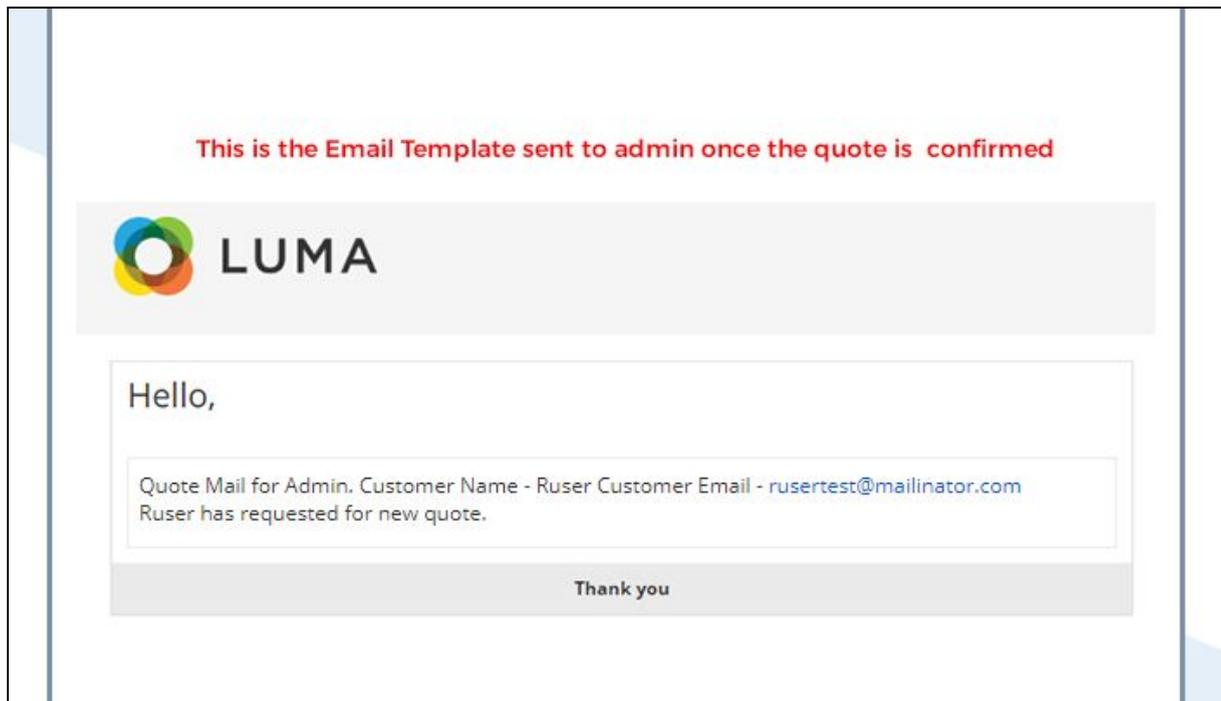
23. This is the Email Template sent to customers when the Quote is Modified by admin.



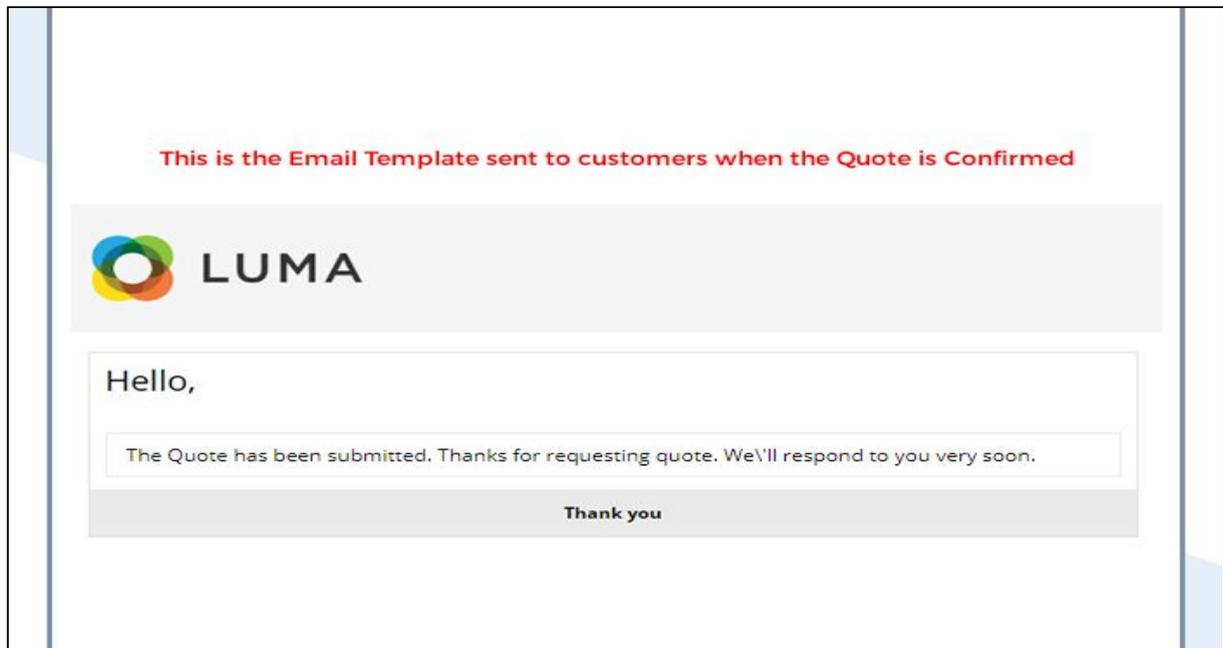
24. This is the Email Template sent to customers as a reminder when their quotation is going to expire.



25. This is the Email Template sent to admin once the quote is confirmed.



26.This is the Email Template sent to customers when the Quote is Confirmed.



Get Support From Our Team



We are here to help you out if you are facing any issues after installing the extension. Drop us an email at **support@zestard.com** and will get back to you.