# "Customized Quote" Module

Prestashop Version 1.5

## **Description:**

The "Customized Quote" module allows your customers to send you a request for quote to which you respond through the Back Office.

When a customer accepts your offer, he is redirected to the payment of his shopping cart containing a "Quote" product with the amount of your offer. The quote is then immediately converted into an order!

This allows you to manage this request just like any other order and keep track of it.

CAUTION: This module does not automatically impact your stock management!

In practical terms, your customer sends you a request through a form that you customize using the parameterization of the module.

You respond to this request in the "Orders > Quote" tab of your Back Office by proposing a rate and with the option of including delivery charges.

The customer can accept or reject your offer. If he accepts it, he is then redirected to the usual payment module.

This module also includes a request for quote expiry option, for which you can set the duration. Mails will inform you of new customer requests, cancellation or expiry. Similarly, your customer is informed by mail about your response, the expiry date of his request or a cancellation from your side.

The "customized quote" module is compatible with versions 1.3, 1.4 and 1.5 of Prestashop in French, English and Spanish.

#### Installation:

Use the link "Add a module from my computer" > "Module file" > "devisperso.zip" Or copy the "devisperso" folder in the "modules" folder of your store.

In the "Modules" tab of Back Office (Pricing and Promotion)

- "Customized quote" module > click on "Install"



- >> "Configure": Enter an explanatory sentence in the language(s) of your choice, on the functioning of your estimate system. This sentence will be displayed on the customer's form.



You can, for example, ask him to indicate the urgent nature of his request or remind him about the rules to be followed for this request with respect to your functioning (example: "specify the quantities required as well as the make you want, etc.")

Enregistrer

You can enable or disable the display of the 'request for a quote' button on the product sheet.



In the "Orders" > "Quote" tab

- List of quotes
- Options for the expiry of the quote



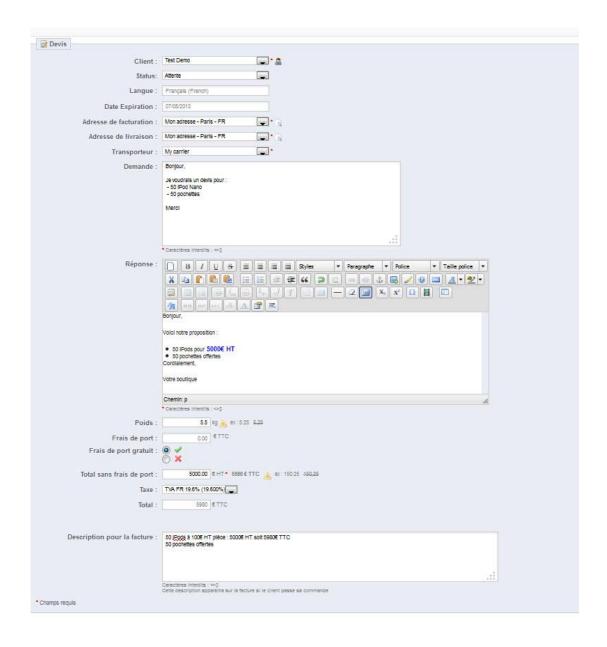
#### **Utilisation:**

#### Back Office > "Orders" > "Quote":

You can respond to the customer requests or create new requests on behalf of a customer, for example if he contacts you by phone in order to get a quote for one or more items (which may or may not be available in your store!).

The customer can then view your offers directly in his account ("My quotes").





A new request appears with the Wait status, the total is at 0.

You can make an offer to your customer by clicking on this line.

You have to complete the mandatory fields:

- Your response: The detailed offer
- Free shipping or not: By default free shipping is activated
- The total price, tax excluded, of the quote
- The tax to be applied to quote
- The weight is mandatory only if the transport invoicing is based on the weight (BO transporting tab).

The grey fields are completed automatically.

The language corresponds to the language in which the request was made.

You can add a description for the invoice. This description will appear on the invoice if the customer places his order.



Numéro de commande : AXFIB DPNC	Produit / Référence		Prix unitaire (HT)	Prix unitaire (TTC)	Réduction	Qté	Total à payer (TTC)
Date de commande : 07-04-2013 11:23	Devis		5 000,00 €	5 980,00 €	-	1	5 980,00 €
Made de actement :					Frais de p	oort offerts	- 2.39
Mode de paiement : /irement 5 980,00					Total Pr	oduits HT	5 000,00 €
bancaire €					Total Pro	duitsTTC	5 980,00 €
					Frais d'e	expédition	2,39 €
						TVA	980,00€
					Tot	al à payer	5 980,00 €
	Détail des taxes	Taux de taxe	Total HT	TVA	1		
	Produits	19.600 %	5 000,00€	980,00€			
	Transport	19.600 %	2,00€	0,39€			

The status (with the color of the line in the BO):

50 pochettes offertes

- Wait (blue) = customer awaiting a response from the administrator or administrator awaiting approval from the customer

50 iPods à 100€ HT pièce : 5000€ HT soit 5980€ TTC

- Approved (orange) = The customer has approved the quote but has not paid yet
- Cancelled (yellow) = The customer or admin has cancelled the quote
- Expired (red) = The quote has exceeded the expiry date
- Done (green) = The request for quote is terminated, the customer has placed the order

A mail is sent to the customer in case of a response from the administrator (click on "register"), the expiry of the quote or its cancellation.

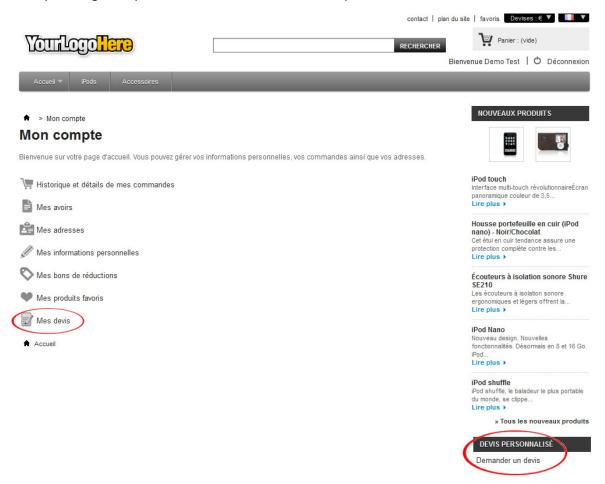


### The delivery charges:

They are automatically calculated according to the carrier, the total excluding delivery charges and the weight. The calculation takes into account the parameterization of the BO (transport tab, price and weight bracket, delivery charges offered, etc.).

CAUTION: Activating free shipping, automatically creates a discount coupon of the total expenses for the customer (when he places his order).

# Front Office > "My account" > "My quotes" or "Requesting for quote" from the "Customized quote" block



The customer can request for a new quote or modify a request until he has not received a response.

#### Historique de vos demandes de devis

Vous trouverez ici les devis demandés depuis la création de votre compte.

DEVIS	DATE	DATE EXP.	PRIX TOTAL	STATUT	ACTIONS
n°000003	07/04/2013	07/05/2013	61,72€	Attente	Approuver ** / Annuler
n°000002	07/04/2013	07/05/2013	10,00€	Annulé	
n°000001	07/04/2013	07/05/2013	5 980,00€	Terminé	

\*\*Implique que j'accepte les conditions générales de vente

Je demande un devis

♠ > Mon compte > Historique de vos demandes de devis > Votre devis

## Nouveau devis

Pour demander un nouveau devis, remplissez le formulaire ci-dessous

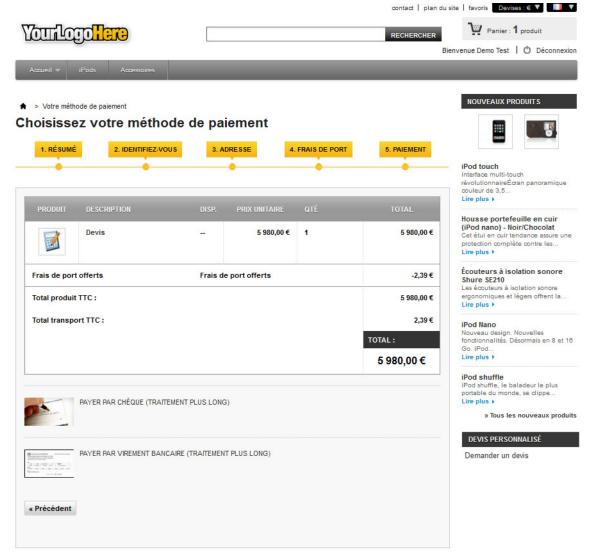
Nouveau devis	
	e demande de devis personnalisé ! otre demande, merci de préciser :
Options pour la commande	
Adresse de facturation	Mon adresse
Adresse de livraison	Mon adresse
Transporteur	My carrier
Votre demande	
Bonjour,  Je voudrais un devis pour : - 50 jPod Nano - 50 pochettes  Merci	
* Caractères interdits : <>{}	
*Champs requis	Je confirme ma demande

Once an offer is made, the customer can approve or cancel his request.

				•		
n°000001	07/04/2013	07/05/2013	5 980,00€	Attente	Approuver ** / Annuler	

<sup>\*\*</sup>Implique que j'accepte les conditions générales de vente

When he approves the offer, he is automatically redirected to the payment module to finalise his order.



If approved without paying, a "Pay" link appears beside the status in the list of quotes.

A mail is sent to the admin in case of a request for quote, expiry or cancellation of the quote by the customer.

