

# Magento – Quotation Module

## User and Installer Documentation

### Version 2.2

1. Overview .....	2
2. Installation .....	2
2.1 Installation générale .....	2
2.1 Installation .....	2
2.2 Magento Updates.....	3
2.3 Other modules compatibility .....	3
3. Quotation Module .....	3
3.1 New entries.....	3
3.1.1 Back office .....	3
3.1.2 Front office .....	4
3.2 Settings .....	4
3.3 Work with Quotations .....	5
3.3.1 Create a new Quotation .....	5
3.3.2 Find a Quotation .....	5
3.3.2 Edit a Quotation .....	5
3.3.3 Add Products .....	6
3.3.4 Printing / Customer notification .....	7
3.3.5 Duplicate quotation .....	7
3.4 Customer side.....	8
3.4.1 Quotations list .....	8
3.4.2 Quotation request .....	9
3.4.2 Quotation request for 1 product .....	10
3.5 Additional information .....	12
3.5.1 Taxes .....	12

## 1. 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.

## 2. Installation

### 2.1 Installation générale

#### 2.1 Installation

Module has been tested and committed with Magento 1.2.1  
Logistic module requires purchase module

Description	Source	Target
Code	App/code/local/MDN/Quotation	App/code/local/MDN
Design admin (layout)	App/Design/adminhtml/default/default/layout/quotation.xml	App/Design/adminhtml/default/default/layout
Design admin (template)	App/Design/adminhtml/default/default/template/quotation	App/Design/adminhtml/default/default/template
Design frontend (layout)	App/Design/frontend/default/default/layout/quotation.xml	App/Design/frontend/default/default/layout
Design frontend (template)	App/Design/frontend/default/default/template/quotation	App/Design/frontend/default/default/template
Declaration file	App/ Etc/modules/MDN_quotation.xml	App/ Etc/modules/
Translation file	app/locale/ fr_FR/quotation.csv	app/locale/ fr_FR/

If you wish to use individual product quote request and quote request from customer cart, you have to copy the following files in app/design/design/frontend/default/[your\_theme]/template :

**Caution** : if your theme has been customized, you must not directly copy this files but only copy differences with the default theme.

- App/design/frontend/default/default/template/catalog/product/view.phtml
- App/design/frontend/default/default/template/catalog/product/list.phtml
- App/design/frontend/default/default/template/checkout/cart.phtml

Then, go back to the magento backoffice and refresh cache. Modules should appear in system  
> configuration > Advanced

## 2.2 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

## 2.3 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, <rewrite> sections.

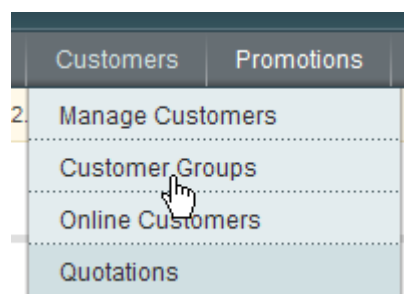
# 3. Quotation Module

## 3.1 New entries

### 3.1.1 Back office

Quotation module adds 2 entries in the back office :

- A new items comes in Customer menu to search quotations



- In customer new, a new tab named “Quotations” displays quotations for the current customer

**Customer Information**

Customer View

**Quotations**

Account Information

Addresses

Orders

Shopping Cart

**zimmermann olivier**

[Back](#) [Reset](#) [+ Create Order](#) [Delete Customer](#) [Save Customer](#) [Save And Continue Edit](#)

[Create New Quotation](#)

Page  of 1 pages | View  per page | Total 2 records found

Ref	Created At	Caption	Action
20090002001	2009-06-03	PC Gamer	<a href="#">Remove</a>

### 3.1.2 Front office

On customer side, Quotation module adds a new item in customer navigation bar :

**MY ACCOUNT**

**Account Dashboard**

Account Information

Address Book

My Orders

My Product Reviews

My Tags

Newsletter Subscriptions

My Wishlist

My Downloadable Products

My Quotations

## 3.2 Settings

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

Warning: id “access denied” message is displayed, you have to log out / log in to reset admin permissions.

Settings :

- **PDF Header:** text displayed in Quotation PDF Header
- **PDF Footer:** text displayed in Quotation PDF Footer
- **Category for Product transformation :** when a quotation is committed, a product is generated. Those products will be linked to this category
- **Email sender :** email sender identity to use to send email notification
- **Email template :** email template to use to send email notification
- **Agreement :** text displayed in quotation pdf

- **Attach PDF to email** : if enabled, when you notify customer for new quote, the quote PDF will be attached to email
- **Attribute set id for associated products** : by default, when a quotation is transformed into product, it is associated to attribute set "default". If you delete this attribute set, you have to set another one.
- **Default validity duration**: this is the default duration in days, in which a quote is valid. You can change this value for each quotation in quotation page.
- **Disable add to cart button for individual request** : if enabled, "add to cart button" in product list and product view will be hidden if product accept individual quote.

You can also configure settings to allow customer to request a quotation :

- **Allow quotation request** : if enabled, customer could request for quotation using a form from customer area
- **Email sender** : Email to use to send new request notification
- **Send to** : Email to use to send new request notification
- **Template** : Email template to use

### 3.3 Work with Quotations

#### 3.3.1 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

#### 3.3.2 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

#### 3.3.2 Edit a Quotation

## Edit Quotation

Back Create Product Save Duplicate

Quotation #2009060009

Customer	<a href="#">zimmermann olivier</a>		
Created at	2009-06-05	Show detail prices	<input checked="" type="checkbox"/>
Updated at	2009-06-05	Is visible ?	<input checked="" type="checkbox"/>
Caption *	PC Gamer		Price (excl tax)
			<input checked="" type="checkbox"/> Calculate from subitems 611.00
Valid until	2009-06-25		
Message	Do not hesitate to call me back at +33 00 00 000 00 for further information		Weight
			<input checked="" type="checkbox"/> Calculate from subitems 9.00
Free Shipping	<input type="checkbox"/>	Last Notification Date	2009-06-04 08:26:00 ( <a href="#">Notify Customer</a> )
Product	Quotation not transformed into product.		Associated Promotion
			No promotion associated

Champs	Description
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"> <li>- New : quotation is created but not visible by customer</li> <li>- Customer request : quotation is created because customer made a quotation request. You must set status to "active" to allow customer to view it</li> <li>- Active : customer can view quotation</li> <li>- Expired : quotation is expired</li> </ul>
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

### 3.3.3 Add Products

There are 2 ways to add products to quotation

- Select products from database : 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 :

Quotation Items

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"/>	<a href="#">Remove</a>
2	1	cg45	Carte graphique G45	2	240.00	0.00	1.00	<input type="checkbox"/>	<a href="#">Remove</a>
4			Assemblage	1	11.00	0.00	5.00	<input type="checkbox"/>	<a href="#">Remove</a>

Champs	Description
Position	Set products order in quotation
Product Id	Empty if fake product
Ref	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

### 3.3.4 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.

### 3.3.5 Duplicate quotation

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

### Duplicate Quotation

Id	2009060009
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

## 3.4 Customer side

### 3.4.1 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	<a href="#">View Quotation</a>
2009060009	6/5/09	PC Gamer	<a href="#">View Quotation</a>

**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  
Valid until : June 25, 2009

[Add to Cart](#)
[Print Quotation](#)

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)
		<a href="#">Devis no 20090002001 - PC Gamer</a> <i>Description</i> 2 x Produit 1 <i>Description2</i> 1 x Assemblage	<input type="checkbox"/>	€491.00	€532.12	<input type="text" value="1"/>	€491.00	€532.12
		<a href="#">Produit 2</a>	<input type="checkbox"/>	€120.00	€130.05	<input type="text" value="1"/>	€120.00	€130.05

Continue Shopping

Update Shopping Cart

### 3.4.2 Quotation request

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

 **QUOTE INQUIRY !**  
Fill your cart with wanted products and click here to request for a quote !  
[Create request](#)

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.

## Request for a new quotation

### 1. Select products from your cart

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

### 2. Type your message

Please offer us your best prices for those large quantities

### 3. Send us your inquiry

[Send Inquiry >](#)

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.

### 3.4.2 Quotation request for 1 product

Quotation module also include a function to allow customer to make a quotation request for a specific product.

To enable individual quote request, go in product sheet in magento, tab “general” and set to yes dropdown menu “Allow individual quote request”.

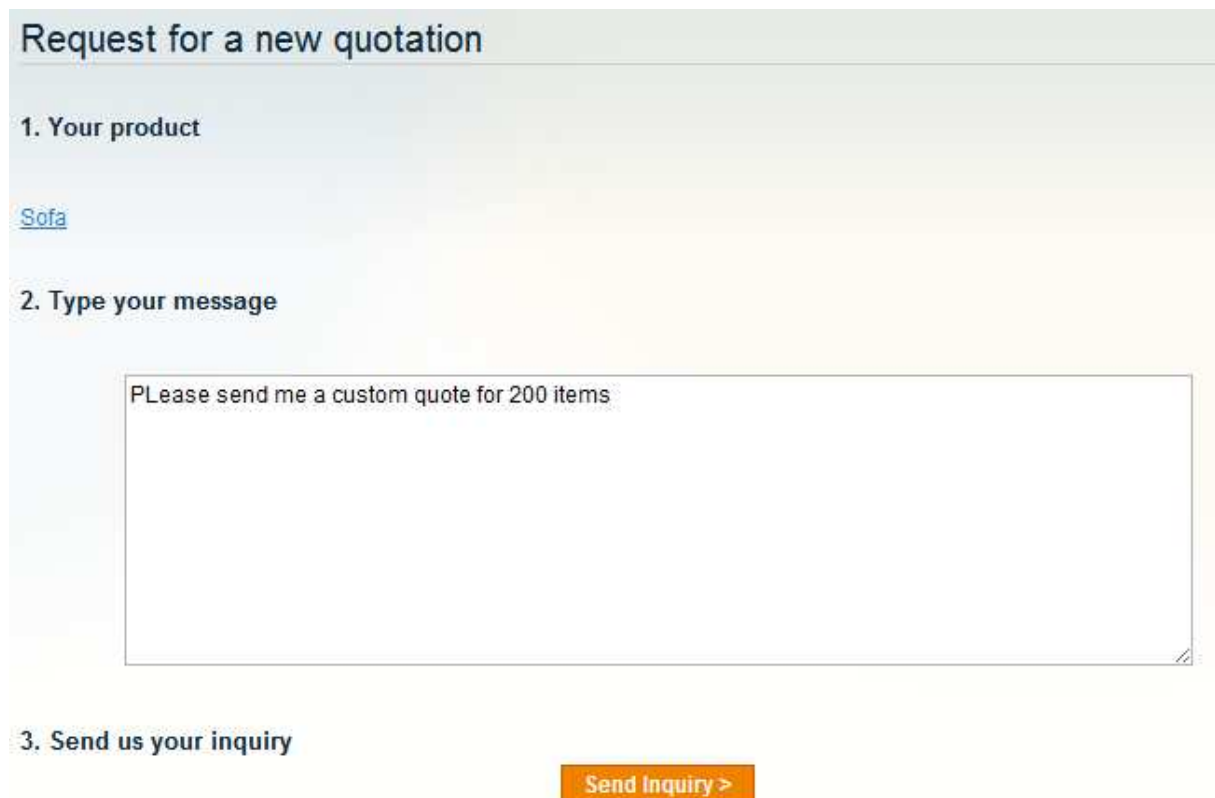
Allow individual quote request  [GLOBAL]

Once this option is enabled, a new button “Request a quote” is visible in product list and product view :



When customer clicks on “Request a Quote” button, if he is not logged in, he’s redirected to the log in / create an account form.

Once logged in, he is redirected to “Quote request” form:



The screenshot shows a form titled 'Request for a new quotation'. It is divided into three main sections:

- 1. Your product**: Contains a dropdown menu with 'Sofa' selected.
- 2. Type your message**: Contains a large text area with the placeholder text 'PLease send me a custom quote for 200 items'.
- 3. Send us your inquiry**: Contains an orange button labeled 'Send Inquiry >'.

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.

## **3.5 Additional information**

### **3.5.1 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.