



The complete Magento Quotation manager

## Cart2Quote User Manual

Version 2.3.4

Support questions: [support@cart2quote.com](mailto:support@cart2quote.com)

Sales questions: [sales@cart2quote.com](mailto:sales@cart2quote.com)

Website: [www.cart2quote.com](http://www.cart2quote.com)



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This manual is divided in three sections. Frontend, how your website visitor will experience Magento Quotations in the front-end. How a shopmanager can process quotation requests on a daily basis in the backend and how to setup and customize Cart2Quote using the Cart2Quote admin panel.

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## Introduction Cart2Quote | Magento Quotation Extension

Cart2Quote is the most complete Magento module that enables customers and shopowners to create a Request for Quote (RFQ's) on Magento websites. With Cart2Quote you can effectively track customer quotations, edit quotation requests, create proposals and convert quotations to orders. This all via the Front-end or Backend of Magento.

This manual assumes you've already successfully installed Cart2Quote on your server. If you need instructions with installing, please read the Installation Manual that also comes with the installation package.



Cart2Quote is a pretty complex module with lots of functionalities. To utilize all features, configuring and setting it up will take some time. Please make sure you read this manual completely and follow the necessary steps carefully.

We wish you many many leads generated by Cart2Quote,  
and may the force be with you to convert them all into orders!

the Cart2Quote team





# 1. Front-end from a customers perspective

## Product grid/list and product detail view

The Add to Quote button is only shown when a product is configured to enable quotations. This way you can have within one category several products with the Add to Quote button enabled and others not.

The screenshot displays a product grid at the top with three items:

- CN Clogs Beach/Garden Clog**: Price \$15.99. Buttons: Add to Cart, Add to Compare.
- ASICS® Men's GEL-Kayano® XII**: Price \$134.99. Buttons: Add to Cart, Add to Quote, Add to Compare.
- Kenneth Cole New York Men's Con-verge Slip-on**: Price \$160.99. Buttons: Add to Cart, Add to Compare.

The detailed view for the ASICS® Men's GEL-Kayano® XII shoe includes:

- Product image and a zoom-in feature (double click on image to view full picture).
- Price: \$134.99.
- Availability: In stock.
- Buttons: Add to Compare, Add to Cart, Add to Quote.
- Quantity selector: Qty: 1.
- Form fields: \*Shoe Size (dropdown menu showing 8), \* Required Fields.
- Quick Overview: The ASICS® GEL-Kayano® XII running shoe delivers the ultimate blend of cushioning and support.



It is also possible to show the quotation button on the product detail page but hide it in the list/grid views. Please review the Installation Manual for instructions.





## Shopping Cart and Quotation overview page

One of the significant changes in Cart2Quote 2.0 is the completely overhauled Cart page. The shoppingcart page now consists of a page with two tabs.

- 1) Shoppingcart
- 2) Quotation Request

Customers can easily switch between the two lists and can order or request a quote at the same time.

The screenshot shows the 'Request for Quote' tab selected. At the top, there are two tabs: '1 Shopping Cart' and '2 Request for Quote'. Below the tabs, the page title is 'Request for Quote'. The main content area contains a table with the following columns: 'Remove', 'Product Name', 'Remarks with product', 'Unit price', and 'Qty \*'. The table lists a 'Gaming Computer' with a unit price of \$5,249.95 and a quantity of 1. The product details include: Case (1 x NZXT Lexa Silver Aluminum ATX Mid-Tower Case), CPU (1 x AMD A64 X2 3800+ 2.0GHz OEM), RAM (1 x Crucial 2GB PC4200 DDR2 533MHz Memory), Hard Drive (1 x Seagate 500GB HD - 5400RPM), and Peripherals (1 x Microsoft Wireless Optical Mouse 5000 and 1 x Microsoft Natural Ergonomic Keyboard 4000). A 'Remarks with product' field contains a warning message. At the bottom, there are buttons for 'Continue Shopping' and 'Move to Shopping cart'.



The screenshot shows the 'Shopping Cart' tab selected. At the top, there are two tabs: '1 Shopping Cart' and '2 Request for Quote'. Below the tabs, the page title is 'Shopping Cart'. The main content area contains a table with the following columns: 'Product Name', 'Unit Price', 'Qty', and 'Subtotal'. The table lists 'ASICS® Men's GEL-Kayano® XII' with a unit price of \$134.99, a quantity of 1, and a subtotal of \$134.99. Below the table, there are buttons for 'Continue Shopping', 'Update Shopping Cart', and 'Copy to Quotation'. To the right, there is a 'Proceed to Checkout' button. Below the table, there are sections for 'Based on your selection, you may be interested in the following items:', 'DISCOUNT CODES', and 'ESTIMATE SHIPPING AND TAX'. The 'Grand Total' is \$134.99. At the bottom, there is a 'Proceed to Checkout' button and a link for 'Checkout with Multiple Addresses'.



Cart2Quote is able to move items from cart to quote and vice versa. Cart items will be copied to the quote instead of moved. Why? Simply because ordering is the main purpose of the shoppingcart. Items will therefore never be removed from the shoppingcart.





Cart2Quote offers a minimalistic submit form. This will help the conversion of visitors to leads. Entering the shipping details by selecting “Request a shipping quote” is optional but can also be set to mandatory using the Cart2Quote configuration.

The screenshot shows a web form titled "ENTER YOUR DETAILS TO GET A PRICE PROPOSAL". At the top, there are two buttons: "Continue Shopping" on the left and "Move to Shopping cart" on the right. The main form area contains a text box for "Do you have a general remark with this Quote Request?". Below this are several input fields: "Email Address \*", "First Name \*", "Last Name \*", "Company", and "Telephone \*". At the bottom left of the form is a checkbox labeled "Request a shipping quote". A large orange button labeled "Submit Quote Request" is positioned at the bottom right of the form.

After checking “Request shipping quote” the submit form is extended with the following part.

This screenshot shows the extended form after the "Request a shipping quote" checkbox is checked. It includes the "Company" and "Telephone \*" fields from the previous form. Below these is a checked checkbox for "Request a shipping quote". A new section titled "SHIPPING DETAILS" is added, with the instruction "Enter your destination to get a shipping quotation". This section contains several fields: "Address \*", "City \*", "Zip/Postal Code \*", "State/Province \*", and "Country \*". The "State/Province \*" field has a dropdown menu with the text "Please select region, state or provin". The "Country \*" field has a dropdown menu with "United States" selected. A red asterisk and the text "\* Required Fields" are located at the bottom right of the shipping details section. A large orange button labeled "Submit Quote Request" is at the bottom right of the entire form.





## Transactional emails



Van: support@server7.hostingtime.eu  
 Onderwerp: **Welcome, Remco de Jong!**  
 Datum: 3 september 2011 14:39:41 GMT+02:00  
 Aan: Remco de Jong



Dear **Remco de Jong**,

Welcome to Demo Store. An account was created for you so that we can handle your Request. In a short time you will receive confirmation of your this Quote Request. You can use the details below to login and follow the status of your request.

Use the following values when prompted to log in:  
 E-mail: [remco@ophirah.nl](mailto:remco@ophirah.nl)  
 Password: quote123

When you log in to your account, you will be able to do the following:

- Edit, reject and accept price proposals
- Check the status of orders and quotes
- View past orders and re-order
- Make changes to your account information
- Change your password
- Store alternative addresses (for shipping to multiple family members and friends!)

If you have any questions about your account or any other matter, please feel free to contact us at [dummyemail@magentocommerce.com](mailto:dummyemail@magentocommerce.com) or by phone at (555) 555-0123.

Thanks again!



## Hello Remco de Jong,

Thank you again for your Quote Request from Main Store.

You will find our proposal in the attached PDF.  
Our Terms and Conditions are also attached as PDF.

### Your Quote Request #Q10.134 (placed on May 31, 2012)

Shipping Information:	Remarks with Request
enter your address enter your city, enter your Zip United States 87786765675564	This is our best price

Item	SKU	Tier/Qty	Price	Subtotal
<b>My Computer</b>	mycomputer	1	\$1,635.97	\$1,635.97
Case				
1 x Apevia Black X-Cruiser Case ATX Mid-Tower Case (Default) \$150.00		5	\$1,570.53	\$7,852.65
CPU				
1 x AMD Phenom X4 9850 Black Ed. 2.50GHz Retail \$335.99		100	\$981.58	\$98,158.20
Hard Drive				
1 x Western Digital 500GB HD - 7200RPM \$299.00				
Ram				
1 x Crucial 1GB PC4200 DDR2 533MHz Memory \$150.99				
Monitor				
1 x 30" Flat-Panel TFT-LCD Cinema HD Monitor \$699.99				
			Subtotal	<a href="#">Login</a>
			Shipping & Handling	<a href="#">Login</a>
			<b>Grand Total</b>	<a href="#">Login</a>

**Conditions:**  
We trust that you will find our quote satisfactory and look forward to working with you. Please contact us should you have any questions at all.

If you have any questions about your quote request please contact us at [support@example.com](mailto:support@example.com) or call us at Monday - Friday, 8am - 5pm PST.

Thank you, **Main Store**





PDF attached to email with price proposal



**Cart2Quote**  
The complete Magento Quotation manager

**TO:** Ophirah  
My address  
My city, 5617 FR  
ALABAMA, UNITED STATES

**Quote Proposal:** Q10.1  
**DATE OF PROPOSAL:** Sep 3, 2011  
**PROPOSAL VALID UNTIL:** Sep 6, 2011 ( 3 days )

PRODUCT NAME	SKU	QTY	PRICE	SUBTOTAL
<b>Gaming Computer</b>	COMPUTER_13282	1	\$5,249.95	\$5,249.95
Make a computer				
Case		20	\$5,000.00	\$100,000.00
1 x NZXT Lexa Silver Aluminum ATX Mid-Tower Case (Default)			\$0.00	
CPU		100	\$4,900.00	\$490,000.00
1 x AMD A64 X2 3800+ 2.0GHz OEM \$100.00				
RAM				
1 x Crucial 2GB PC4200 DDR2 533MHz Memory \$150.00				
Hard Drive				
1 x Seagate 500GB HD - 5400RPM \$0.00				
Peripherals				
1 x Microsoft Wireless Optical Mouse 5000 \$0.00				
1 x Microsoft Natural Ergonomic Keyboard 4000 \$0.00				

I would like a firm reduction, when I order 20 or more please.

Can you ship this item in six days?

SHIPPING & HANDLING PRICE VARIES  
SELECT REQUIRED QTY AND CHECK OUT ONLINE  
TO SEE APPLICABLE PRICE™

We TRUST THAT YOU WILL FIND OUR QUOTE SATISFACTORY  
AND LOOK FORWARD TO WORKING WITH YOU. PLEASE CONTACT US SHOULD YOU  
HAVE ANY QUESTIONS AT ALL.

Magento customer dashboard

**MY ACCOUNT**

- Account Dashboard
- Account Information
- Address Book
- My Orders
- Billing Agreements
- Recurring Profiles
- My Tags
- My Downloadable Products
- Newsletter Subscriptions
- My Quotes**

Quote Request #Q10.1 [Resubmit Quote](#) | [Print Quote](#)

Quote Request Date: September 3, 2011  
Proposal Valid until: Sep 6, 2011 ( 3 days )

**Shipping Address**  
My address  
My city, 5617 FR  
United States  
+31641891396

**Shipping Method**  
Shipping & Handling price varies. Please select required quantity and checkout online to see applicable price.

**Remark with Proposal**  
Can you ship this item in six days?

Remove	Product Name	Comment with Product	Original Price	Qty	Price Proposal
	 <b>Gaming Computer</b> Case 1 x NZXT Lexa Silver Aluminum ATX Mid-Tower Case (Default) \$0.00 CPU 1 x AMD A64 X2 3800+ 2.0GHz OEM \$100.00 RAM 1 x Crucial 2GB PC4200 DDR2 533MHz Memory \$150.00 Hard Drive 1 x Seagate 500GB HD - 5400RPM \$0.00 Peripherals 1 x Microsoft Wireless Optical Mouse 5000 \$0.00 1 x Microsoft Natural Ergonomic Keyboard 4000 \$0.00	I would like a firm reduction, when I order 20 or more please.	\$5,249.95	1	<input checked="" type="radio"/> \$5,249.95 <input type="radio"/> \$5,000.00 <input type="radio"/> \$4,900.00

Quote status: Proposal sent

[Edit Quote](#) [Reject Proposal](#) [Confirm and Checkout](#)





## 2. Managing Quotations: Create, Edit & Convert quotes

### Quotation Grid

The store owner can view quotation in a grid that displays the most important information. The showpowner will be able to change the status of the quote request from within this screen.

The screenshot shows a web interface for managing quotations. At the top, there is a navigation menu with options like Dashboard, Sales, Catalog, Mobile, Customers, Promotions, Newsletter, CMS, Reports, and System. Below the menu, the page title is "Quotations" and there is a "Create New Quote" button. The interface includes a pagination control showing "Page 1 of 1 pages" and "View 20 per page" with "Total 5 records found". There are also "Reset Filter" and "Search" buttons. Below this is a table with columns for Quote Request #, Created On, Company, First Name, Last Name, Email, Country, City, Status, and Action. The table contains five rows of data, each with a checkbox in the first column and a "View" link in the last column.

Quote Request #	Created On	Company	First Name	Last Name	Email	Country	City	Status	Action
Q10.5	Sep 3, 2011 6:25:09 AM	Ophirah	Remco	de Jong	remco@ophirah.nl	United States	My city	Proposal saved	<a href="#">View</a>
Q10.4	Sep 3, 2011 6:01:47 AM	uio	remco	de	rem@ophirah.nl	United States	enter your city	Request	<a href="#">View</a>
Q10.3	Sep 3, 2011 6:01:09 AM	uio	remco	de	rem@ophirah.nl	United States	enter your city	Request	<a href="#">View</a>
Q10.2	Sep 3, 2011 5:45:04 AM	uio	remco	de	rem@ophirah.nl	United States	enter your city	Request	<a href="#">View</a>
Q10.1	Sep 3, 2011 5:23:03 AM	Ophirah	Remco	de Jong	remco@ophirah.nl	United States	My city	Proposal saved	<a href="#">View</a>

### Free version - until here and no further

We hope you enjoy the free version of Cart2Quote. To unlock all functionality and to process quotations at lightning speed, consider upgrading to one of the paid versions. [Starting at €399](#). Or [unlock all functions on a local test server](#).

The screenshot shows the details of a quote request (Q10.5) with a date of Sep 3, 2011 6:25:09 AM. The page includes sections for Account Information (Customer Name: Remco de Jong, Company name: Ophirah, Email: remco@ophirah.nl) and Shipping Information. A prominent white notification box is overlaid on the page, stating: "Feature currently disabled, [click here to upgrade](#)". Below this, it explains that users can enter prices, tier prices, notes, and shipping prices, and automatically send PDF proposals. It encourages users to "Upgrade now" and enjoy fast and efficient handling of quote requests. A "Close and go back" button is also present.





## Quotation detail page

**Quote Request # Q10.1 | Quote Request Date Sep 3, 2011 5:23:03 AM** [Back](#) [Cancel Quote](#) [Print](#) [Save Quote](#)

<b>Quote # Q10.1</b>	<b>Account information</b>
Last update: <b>Sep 3, 2011 6:31:01 AM</b>	Customer Name: <a href="#">Remco de Jong</a>
Quote Request Status: <b>proposal saved</b>	Company name: <b>Ophirah</b>
RFQ From: <b>Main Website</b>	Email: <a href="mailto:remco@ophirah.nl">remco@ophirah.nl</a>
<b>Main Store</b>	Customer Group: <b>General</b>
<b>English</b>	

<b>General Comment</b>	<b>Shipping address</b>
Can you ship this item in six days? <input type="text"/> (Maximum characters: 400) <input type="text" value="400"/>	Address: My address City, Zip code: My city, 5617 FR Country: United States Telephone: +31641891396

<b>Product Information</b>	<a href="#">+ Edit products</a>																																										
<table><thead><tr><th>Product name</th><th>SKU</th><th>Comment with Product</th><th>Original Price</th><th>Qty</th><th>Price Proposal</th></tr></thead><tbody><tr><td><b>Gaming Computer</b></td><td>computer_fixed</td><td>I would like a firm reduction, when I order 20 or more please.</td><td>\$5,249.95</td><td>1</td><td><input type="radio"/> 5249.95</td></tr><tr><td><b>Case</b> 1 x NZXT Lexa Silver Aluminum ATX Mid-Tower Case (Default) \$0.00</td><td></td><td></td><td></td><td>20</td><td><input type="radio"/> 5000</td></tr><tr><td><b>CPU</b> 1 x AMD A64 X2 3800+ 2.0GHz OEM \$100.00</td><td></td><td></td><td></td><td>100</td><td><input type="radio"/> 4900</td></tr><tr><td><b>RAM</b> 1 x Crucial 2GB PC4200 DDR2 533MHz Memory \$150.00</td><td></td><td></td><td></td><td></td><td><input type="radio"/> exclude from order</td></tr><tr><td><b>Hard Drive</b> 1 x Seagate 500GB HD - 5400RPM \$0.00</td><td></td><td></td><td></td><td></td><td></td></tr><tr><td><b>Peripherals</b> 1 x Microsoft Wireless Optical Mouse 5000 \$0.00 1 x Microsoft Natural Ergonomic Keyboard 4000 \$0.00</td><td></td><td></td><td></td><td></td><td></td></tr></tbody></table>	Product name	SKU	Comment with Product	Original Price	Qty	Price Proposal	<b>Gaming Computer</b>	computer_fixed	I would like a firm reduction, when I order 20 or more please.	\$5,249.95	1	<input type="radio"/> 5249.95	<b>Case</b> 1 x NZXT Lexa Silver Aluminum ATX Mid-Tower Case (Default) \$0.00				20	<input type="radio"/> 5000	<b>CPU</b> 1 x AMD A64 X2 3800+ 2.0GHz OEM \$100.00				100	<input type="radio"/> 4900	<b>RAM</b> 1 x Crucial 2GB PC4200 DDR2 533MHz Memory \$150.00					<input type="radio"/> exclude from order	<b>Hard Drive</b> 1 x Seagate 500GB HD - 5400RPM \$0.00						<b>Peripherals</b> 1 x Microsoft Wireless Optical Mouse 5000 \$0.00 1 x Microsoft Natural Ergonomic Keyboard 4000 \$0.00						
Product name	SKU	Comment with Product	Original Price	Qty	Price Proposal																																						
<b>Gaming Computer</b>	computer_fixed	I would like a firm reduction, when I order 20 or more please.	\$5,249.95	1	<input type="radio"/> 5249.95																																						
<b>Case</b> 1 x NZXT Lexa Silver Aluminum ATX Mid-Tower Case (Default) \$0.00				20	<input type="radio"/> 5000																																						
<b>CPU</b> 1 x AMD A64 X2 3800+ 2.0GHz OEM \$100.00				100	<input type="radio"/> 4900																																						
<b>RAM</b> 1 x Crucial 2GB PC4200 DDR2 533MHz Memory \$150.00					<input type="radio"/> exclude from order																																						
<b>Hard Drive</b> 1 x Seagate 500GB HD - 5400RPM \$0.00																																											
<b>Peripherals</b> 1 x Microsoft Wireless Optical Mouse 5000 \$0.00 1 x Microsoft Natural Ergonomic Keyboard 4000 \$0.00																																											
<b>Shipping Information</b>	<b>File upload</b>																																										
Use Store settings: <input checked="" type="radio"/>	Title: <input type="text"/>																																										
Price per Item: <input type="radio"/>	<input type="radio"/> Uri: <input type="text"/>																																										
Fixed price per Order: <input type="radio"/>	<input type="radio"/> File: <input type="button" value="Kies bestand"/> geen bestand geselecteerd																																										

[Submit Proposal](#) [Create Order](#)

### Actions to perform on the quote detail page

- 1) Enter proposal prices and tiers
- 2) Enter notes and remarks to the quotation
- 3) Enter a custom price for the shipping cost
- 4) Upload a file or URL with your proposal
- 5) Print the PDF of the proposal
- 6) Save the quotation
- 7) Add or change the products in the quotation
- 8) Convert the quote to an order





## Edit the quote

Editing a submitted quote is easy. After you have saved the proposal the “Edit product” button will become active. Pressing it will bring you to the “Create order screen” of Magento with the selected items, including their prices and quantities transferred to this screen. You can press the “Edit product” button after you have selected the items and quantities that need to be edited.



Editing a quote will require you to save the request and to select one Qty per product. Remarks and shipping prices will not be transferred as are the extra quantities per item that were originally requested. This is simply because Magento’s create order screen will not support this functionality. After editing a quote you will be able to create new tiers once back in the quote view.

Payment Method	Shipping Method
No Payment Information Required	<a href="#">Get shipping methods and rates</a>
Order History	Order Totals
Order Comments	Subtotal \$0.00
	Grand Total \$0.00
	Append Comments <input type="checkbox"/>
	Email Order Confirmation <input checked="" type="checkbox"/>
	<input type="button" value="Create Quotation"/> <input type="button" value="Submit Order"/>

Magento’s Create New Order screen is extended and an extra button is placed at the bottom of this screen. After you have changed the items in the list you can press this button and all products including their quantities are transferred back to the quote detail page.

## Creating a new quotation

The workflow is exactly as above, but you will start with an empty form by pressing “Create New Quote” at the right top of the quotation grid page.

Quote Request #	Created On	Company	First Name	Last Name	Email	Country	City	Status	Action
<input type="checkbox"/> Q10.5	Sep 3, 2011 6:25:09 AM	Ophirah	Remco	de Jong	remco@ophirah.nl	United States	My city	Proposal saved	<a href="#">View</a>





### 3. General Configuration

#### Cart2Quote configuration screen - General settings

**General**

**Cart2Quote (c2q\_v1700\_v2.3.4) provided by Ophirah | e-commerce projects**  
For documentation and support visit [cart2quote.zendesk.com](http://cart2quote.zendesk.com) or contact: [support@cart2quote.com](mailto:support@cart2quote.com)

Enabled  [STORE VIEW]  
▲ Enable / disable advanced quote extension

Licence key  [GLOBAL]  
▲ For multiple domains use a semicolon ";" to separate the license-keys.  
To upgrade or to buy a licence visit [cart2quote.com](http://cart2quote.com)

Expiration time for Quote Request  [STORE VIEW]  
▲ in days

Expiration time for Quote Proposal  [STORE VIEW]  
▲ in days

Set standard (fixed) remark with proposal  [STORE VIEW]  
▲ Add remark that appears in new proposal email and in the Quote Proposal PDF

Checkout onepage url  [STORE VIEW]  
▲ Use checkout url after confirmation quote proposal

List/Grid page activation  [STORE VIEW]  
▲ Enable / disable frontend layout update

Detail page activation  [STORE VIEW]  
▲ Enable / disable frontend layout update

Disable account check  [STORE VIEW]  
▲ New quotes can be submitted by existing accounts without having to login first

Auto submit proposal  [STORE VIEW]  
▲ An automatic price proposal is sent, based on the standard (tier) prices. Select No if you choose to manually create custom price proposals.

After adding a product redirect to quotation  [STORE VIEW]



Not using Magento's standard checkout but one of the other checkout modules? The "Checkout onepage url" offers you to enter an alternative checkout url than Magento's default.





Go to -> admin/system\_config/edit/section/qquoteadv/ [transactional emails]

### Request for Quote Save Config

**General**

**Quote number format**

**Emails for Quote Requests**

Email sender	Sales Representative	[STORE VIEW]
New account Template	cart2quote new account (Default Template fro	[STORE VIEW]
▲ Select email to be send		
New request Template	cart2quote request (Default Template from Lor	[STORE VIEW]
▲ Select email to be send		
New proposal Template	cart2quote proposal (Default Template from Li	[STORE VIEW]
▲ Select email to be send		
Request cancelled Template	cart2quote cancel (Default Template from Loc	[STORE VIEW]
▲ Select email to be send		
Request reject Template	cart2quote reject (Default Template from Loca	[STORE VIEW]
▲ Select email to be send		
Send Quote email copy to	bcc-me@ophirah.nl	[STORE VIEW]
▲ Separate by ","		
Default password for new user account	quote123	[STORE VIEW]
▲ Password for new account created during quote request		

**Attachments**

Enable PDF proposal	Yes	[STORE VIEW]
Enable standard document	Kies bestand geen bestand geselecteerd	[STORE VIEW]
▲ Upload any file as default attachment to the proposal email (i.e. Terms and Conditions) Note some providers limit the size of emails.		
Add product short description text to PDF	Yes	[STORE VIEW]

### Actions

- 1) Configure your Cart2Quote related emails and server settings.
- 2) Sending the proposal as PDF attached to the transactional email
- 3) Sending an extra default document with the proposal email (terms & conditions)





## Changing your Cart2Quote transactional emails

You can customize the emails that Cart2Quote is sending after a quote request. There are 6 email templates included and their all in English. Following the instructions below enables you to edit the contents of those emails.

Go to -> /admin/system\_email\_template/new/

Dashboard Sales Catalog Mobile Customers Promotions Newsletter CMS Reports **System** Get help for this page

**New Email Template** Back Reset Convert to Plain Text Preview Template Save Template

Load default template

Template \* cart2quote proposal

Locale \* English (United States)

Load Template

Template Information

Used as Default For System -> Configuration -> Request for Quote -> Emails for Quote Requests -> New proposal Template (GLOBAL)

Template Name \*

Template Subject \* {{var quote.getStoreGroupName()}}: Proposal for Quote Request # {{var quote.increment\_id}}

Insert Variable...

Template Content \*

```
<div style="font:11px/1.35em Verdana, Arial, Helvetica, sans-serif;">
<table cellspacing="0" cellpadding="0" border="0" width="98%" style="margin-top:10px; font:11px/1.35em Verdana, Arial, Helvetica, sans-serif; margin-bottom:10px;">
<tr>
<td align="center" valign="top">
<!-- [ header starts here ] -->
<table cellspacing="0" cellpadding="0" border="0" width="650">
<tr>
<td valign="top"><a href="{{store url=""}}"></a></td>
</tr>
</table>
<!-- [ middle starts here ] -->
<table cellspacing="0" cellpadding="0" border="0" width="650">
<tr>
<td valign="top">
<p>
<strong>Hello {{var customer.name}}</strong><br/><br/>
Thank you again for your Quote Request from {{var quote.getStoreGroupName()}}.
{{if attach_pdf}}<br/><br/>You will find our proposal in the attached PDF.{{/if}}
{{if attach_doc}}<br/><br/>Our Terms and Conditions are also attached as PDF.{{/if}}
</p>
</td>
</tr>
</table>
</td>
</tr>
</table>
</div>
```

Template Styles

```
body,td { color:#2f2f2f; font:11px/1.35em Verdana, Arial, Helvetica, sans-serif; }
```

## Receive the details of a quote request per email

Especially when using the free version, store owners need to be able to see the contents of the submitted quote request. To use the email including the product details do the following:

- 1) Select "Add New Template "
- 2) Load default template: "cart2quote request details"
- 3) Enter the template information and save this template
- 4) Connect template to relevant action (New Request Template) See instructions below





## Link transactional emails to relevant actions

When you do edit the templates be sure you connect the new templates to the desired actions in the Cart2Quote configuration page.

`/admin/system_config/edit/section/qquoteadv/ [Emails for quote requests]`

Emails for Quote Requests	
Email sender	Sales Representative [STORE VIEW]
New account Template	cart2quote new account (Default Template fro [STORE VIEW] ▲ Select email to be send
New request Template	✓ cart2quote request (Default Template from Locale) [STORE VIEW] ▲ Select email to be send
New proposal Template	cart2quote proposal (Default Template from Li [STORE VIEW] ▲ Select email to be send
Request cancelled Template	cart2quote cancel (Default Template from Loc [STORE VIEW] ▲ Select email to be send
Request reject Template	cart2quote reject (Default Template from Loca [STORE VIEW] ▲ Select email to be send
Send Quote email copy to	testbc@ophirah.nl [STORE VIEW] ▲ Separate by ";"
Default password for new user account	quote123 [STORE VIEW] ▲ Password for new account created during quote request

An alternative way to edit these emails is to find the .csv files on your ftp server and change them directly.

## Enabling the Cart2Quote shipping method

Cart2Quote adds it's own shipping method that allows for the custom shipping prices to be entered from quote proposal creation screens. You need to enable this method for Cart2Quote to work.

Go to -> `/admin/system_config/edit/section/carriers/ [Cart2Quote]`

Shipping Methods		Save Config
Flat Rate		▼
Table Rates		▼
Free Shipping		▼
UPS		▼
USPS		▼
FedEx		▼
DHL		▼
Cart2Quote		▲
Enabled	Yes [STORE VIEW]	
Title	Qquote Shipping Proposal Name [STORE VIEW]	
Method name	Qquote Shipping Proposal Method [STORE VIEW]	





## Customizing PDF design

Using the “Invoice and Packing Slip Design” you can customize the logo on top of the quotation PDF as the address details of your company. If you change the logo, the default size is 200 x 50 px

Got to -> /admin/system\_config/edit/section/sales/ [Invoice and Packing Slip Design]

The screenshot shows the Magento Admin configuration page for the 'Sales' section, specifically the 'Invoice and Packing Slip Design' configuration. The page has a 'Save Config' button in the top right corner. Below the section title, there are three expandable sections: 'Checkout Totals Sort Order', 'Reorder', and 'Invoice and Packing Slip Design'. The 'Invoice and Packing Slip Design' section is expanded, showing three configuration options:

- Logo for PDF Print-outs (200x50)**: A radio button labeled 'Kies bestand' is selected. The text reads 'geen bestand geselecteerd' and '[STORE VIEW]'. A note below says 'Default logo, will be used in PDF and HTML documents. (jpeg, tiff, png)'. There is a small triangle icon to the left of the note.
- Logo for HTML Print View**: A radio button labeled 'Kies bestand' is selected. The text reads 'geen bestand geselecteerd' and '[STORE VIEW]'. A note below says 'Logo for HTML documents only. If empty, default will be used. (jpeg, gif, png)'. There is a small triangle icon to the left of the note.
- Address**: A text area with the instruction 'Fill in the address that should appear on top of the PDF proposal' and '[STORE VIEW]'.



Want to customize more? The PHP file for the creation of the PDF is always opensource. Please read this article how to [further customize your PDF design](#).

## Need more help?

You will find much more development en configuration tips in our forums. Please feel free to share any tips and tricks in our user forum. [Cart2Quote development and configuration help forums](#).





## Magento eCommerce

"Magento is an open source based ecommerce web application that was launched on March 31, 2008. It was developed by Varien (now Magento Inc) with help from the programmers within the open source community but is owned solely by Magento Inc.. Magento was built using the Zend Framework.[1][2] It uses the Entity-attribute-value (EAV) database model to store data.[3]

The Magento Community Edition is the only free version of Magento available. All other versions of Magento are not free.

Varien, the company owning Magento, formerly worked with [osCommerce](#). They originally planned to fork osCommerce but later decided to rewrite it as Magento. Magento officially started development in early 2007.[4] Seven months later, on August 31, 2007, the first public beta version was released. On May 30, 2010, Magento mobile was released; it allows store owners to create native mobile storefront apps.

In September 2010, Magento launched Magento Mobile, an extension platform used to build native applications for [iOS](#). [5]

In February of 2011, [Ebay](#) announced it had made an investment in Magento in 2010, worth a 49% ownership share of the company.

As of June 6, 2011 Ebay owns 100% of Magento. Ebay announced that Magento would join Ebay's new X.Commerce initiative.[6] Magento's CEO and co-founder Roy Rubin wrote on the Magento blog stating that "Magento will continue to operate out of Los Angeles, with Yoav Kutner and me as its leaders." [7]."

From wikipedia, the free encyclopedia

