

User Manual

Propoza for Magento 2

Module Name: Propoza

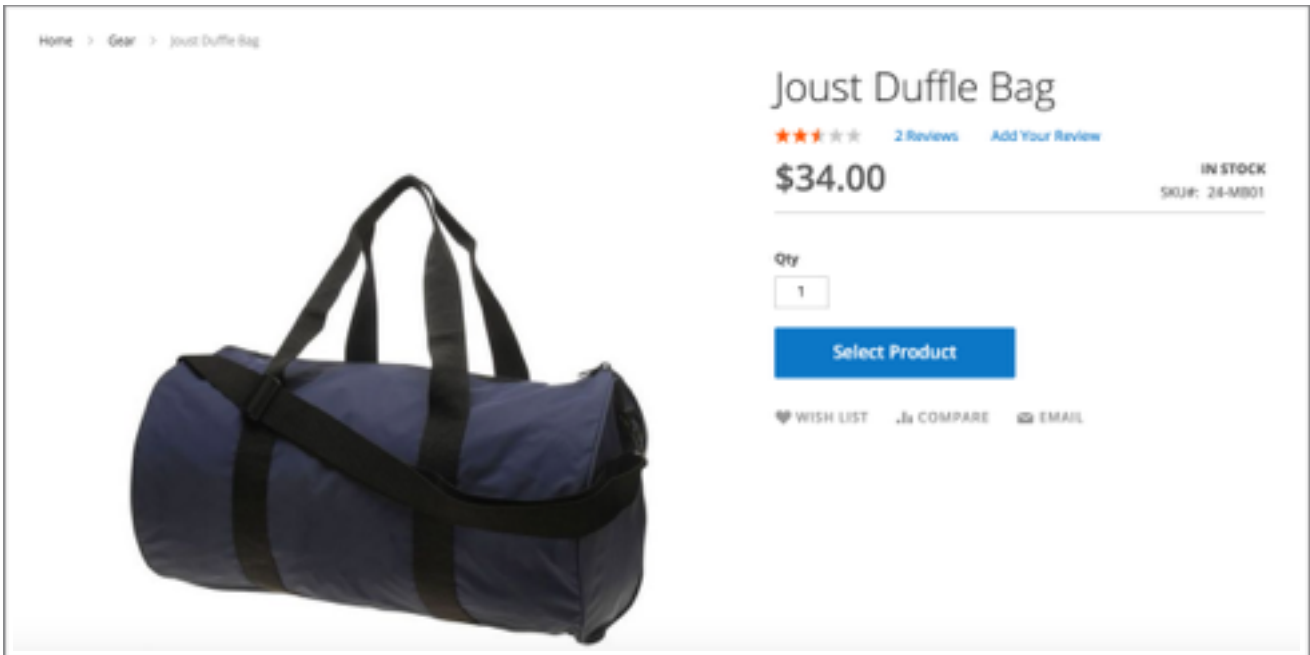
Module version: 1.0.1

Created by: Bram van Dooren

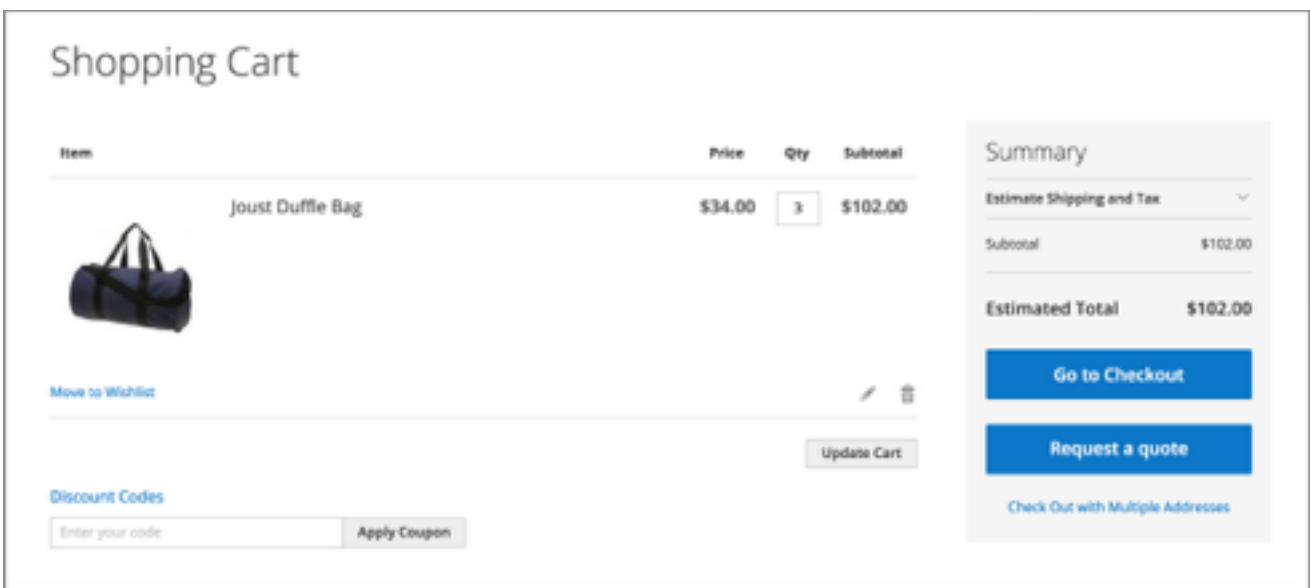
Creation date: 01-10-15

2. Propoza customer workflow

2.1 Select products and request a quote



The customer follows a normal webshop routine and selects the products and quantities he wants to add to the shopping cart.



In the shopping cart the customer is able to go to checkout as usual. Propoza generates a second button: '**Request a quote**'. With this button the customer can request a quote.

Request your Quote

Enter your details for a free and no obligation price proposal.

First name: Lennart Last name: van der Garde

E-mail: lennart@cart2quote.com

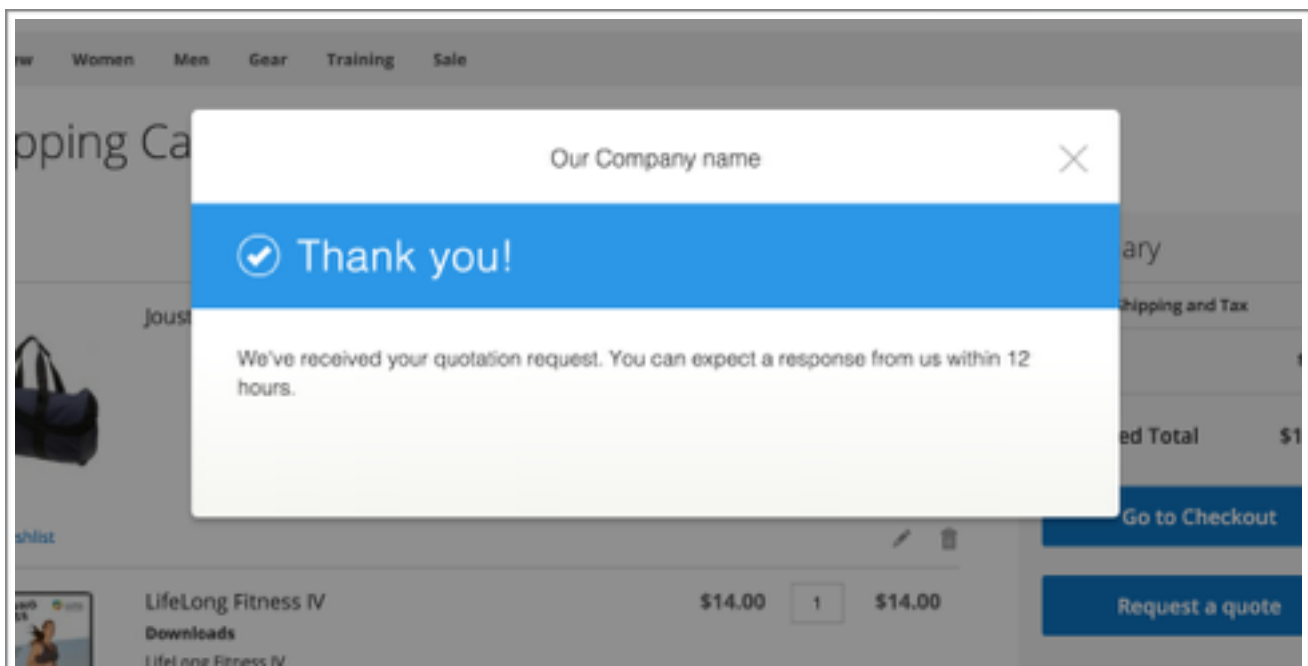
Telephone: 12345678

Company: Cart2Quote

Note: I am looking forward to your offer

[Request my Quote](#)

After requesting the quote the customer fills in the popped-up form.



After completing the form the customer gets a message that his quotation request is successfully send. The customer now waits for the show admin to come with a quote proposal.

2.2 Accept a quote

When the shop admin has made his proposal, the customer gets an e-mail with the an overview of the proposal, a pdf and a link to the proposal page.

Thank you for your request
Please look at our quote proposal and click either accept or decline.

Quote
From: Our Company name
Demo-Demo
demo@propos.com
Quote for: Cart2Quote
Lennart van der Garde
lennart@cart2quote.com
12345678

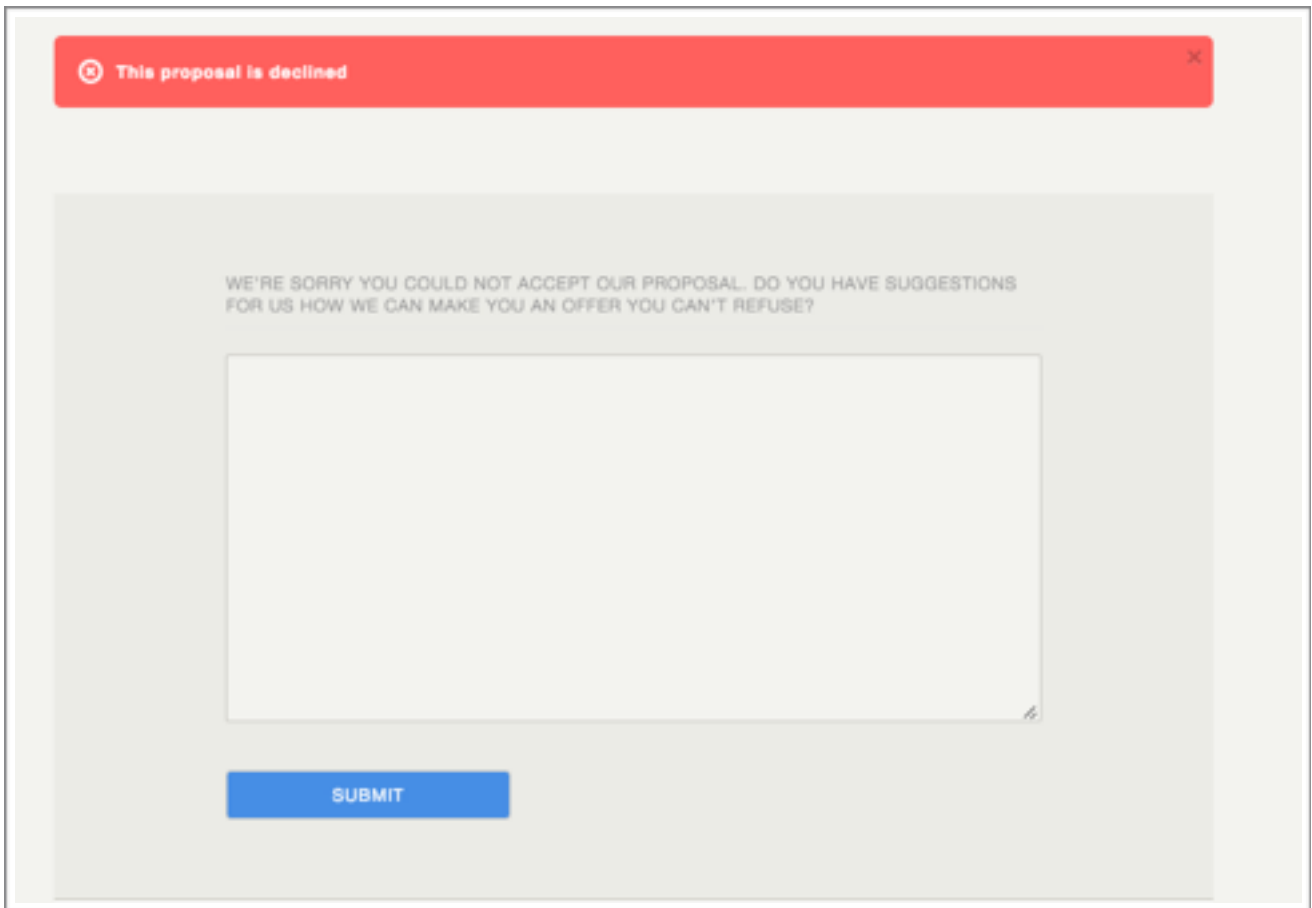
Quote Request # 109

PRODUCT	SKU	PRICE	QTY	TOTAL	PROPOSAL	NEW TOTAL	
Joust Duffle Bag	24-MBC1	\$34.00	3	\$102.00	\$30.00	\$90.00	
TAX	Quote does not include default store tax						
SHIPPING	Quote does not include shipping!						
				\$102.00		\$90.00	

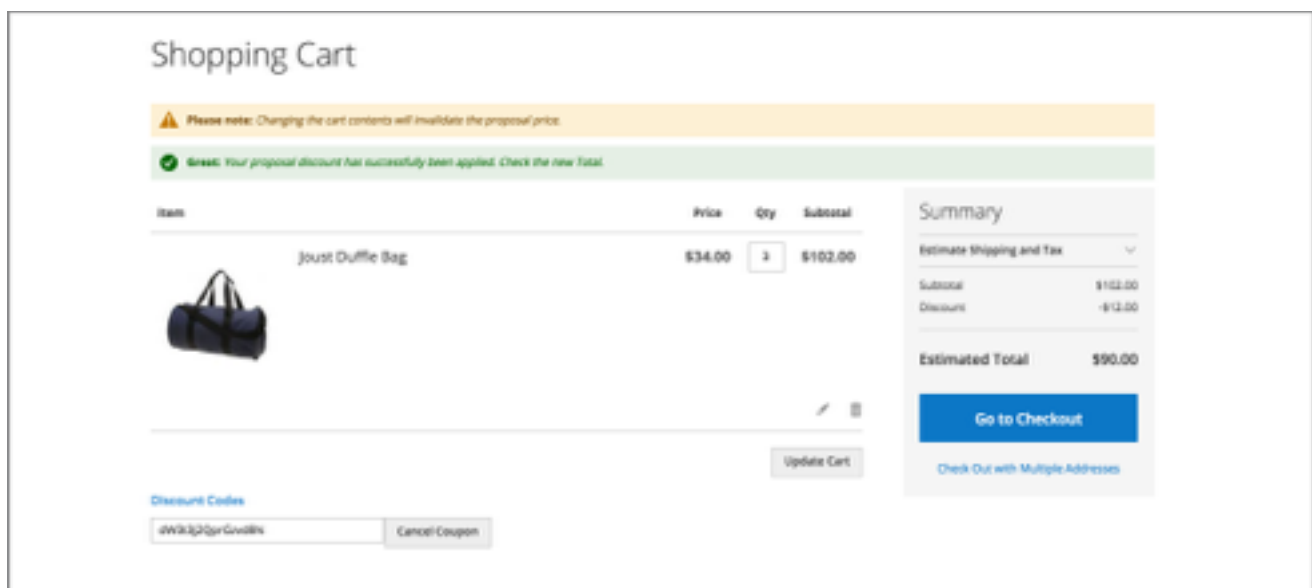
This is where we usually place our conditions, payments terms, tax information and other convincing pure awesomeness! for potential customers.

DECLINE **ACCEPT & CHECKOUT**

Clicking the link in the email will get the customer to the above screen. The customer has two options: **'Decline'** and **'Accept & Checkout'**. Checkout is an exclusive feature for paying users of Propoza.



'Declining' the proposal will get the customer to the above page. Here the customer can give a reason for declining the offer or give other suggestions.



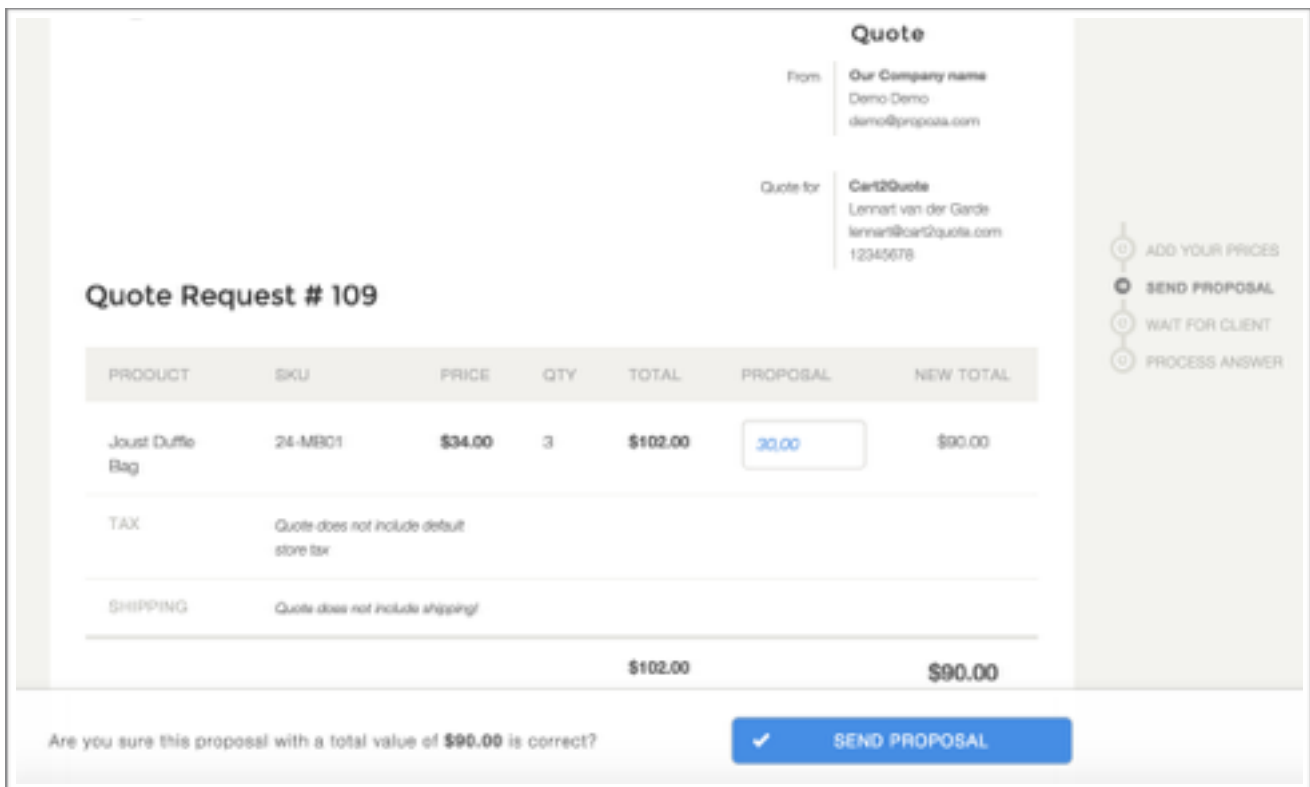
'Accepting' the offer will change the status of the quote proposal to 'accepted'. For the paid version of Propoza a direct **checkout** is available. Then the customer goes to the regular Magento shopping cart page after accepting the Quote Proposal. The customer now is able to checkout with the custom prices for the quoted products via the normal checkout process of Magento.

3. Propoza Shop Admin Workflow

3.1 Process the quote request



On the top of the page, the shop owner can find the new quote requests.



Clicking a quote request will bring the shop admin to the above page. Here the shop admin can give his price for the quote request and click **'Send Proposal'**. The shop admin is also able to change the status of the proposal with a dropdown, preview the proposal and view the quote proposal PDF.

PREVIEW AND EDIT YOUR EMAIL

Recipients

lennart@cart2quote.com

Subject

New Proposal for Quote request #109

Message

Hello Lennart,


Your price proposal is ready.
View and accept your proposal online:
{quote_link}

Request Summary

Estimate ID: #109
Estimate date: 09/29/15
Client: Lennart Van der Garde
Original amount: \$102.00

SEND E-MAIL

Clicking Send Proposal will give the above preview of the e-mail to be sent. The shop admin is able to edit the Email before he sends it. Clicking **'Send Email'** will save the quote and put the status of the quote request on **'pending'**.

 PENDING

Quote

From: Our Company name
Demo Demo
demo@propos.com

Quote for: Cart2Quote
Lennart van der Garde
lennart@cart2quote.com
12345678

Quote Request # 109

PRODUCT	SKU	PRICE	QTY	TOTAL	PROPOSAL	NEW TOTAL
Joust Duffle Bag	24-MB01	\$34.00	3	\$102.00	\$30.00	\$90.00

Are you sure this proposal with a total value of **\$90.00** is correct?

ADD YOUR PRICES
SEND PROPOSAL
WAIT FOR CLIENT
PROCESS ANSWER

The customer is now noticed via e-mail and the shop admin is finished.