

Dealer Inquiry for Magento 2

User Guide

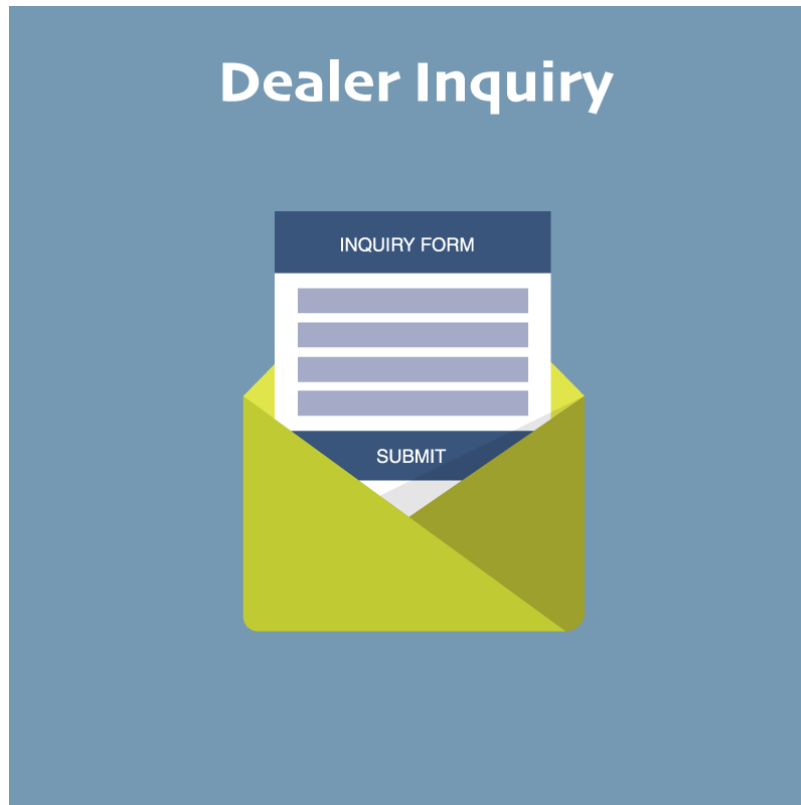


Table of Content

1. [Extension Installation Guide](#)
2. [Configuration](#)
3. [Form Settings](#)
4. [New Dealer Inquiry Email Settings](#)
5. [Dealer Inquiry Successful Submission Email Settings](#)
6. [New Dealer Account Registration Email Settings](#)
7. [GDPR Compliance Notice Settings](#)
8. [Google reCAPTCHA Settings](#)
9. [Dealer Inquiry in Frontend](#)
10. [Manage Dealer Inquiries](#)

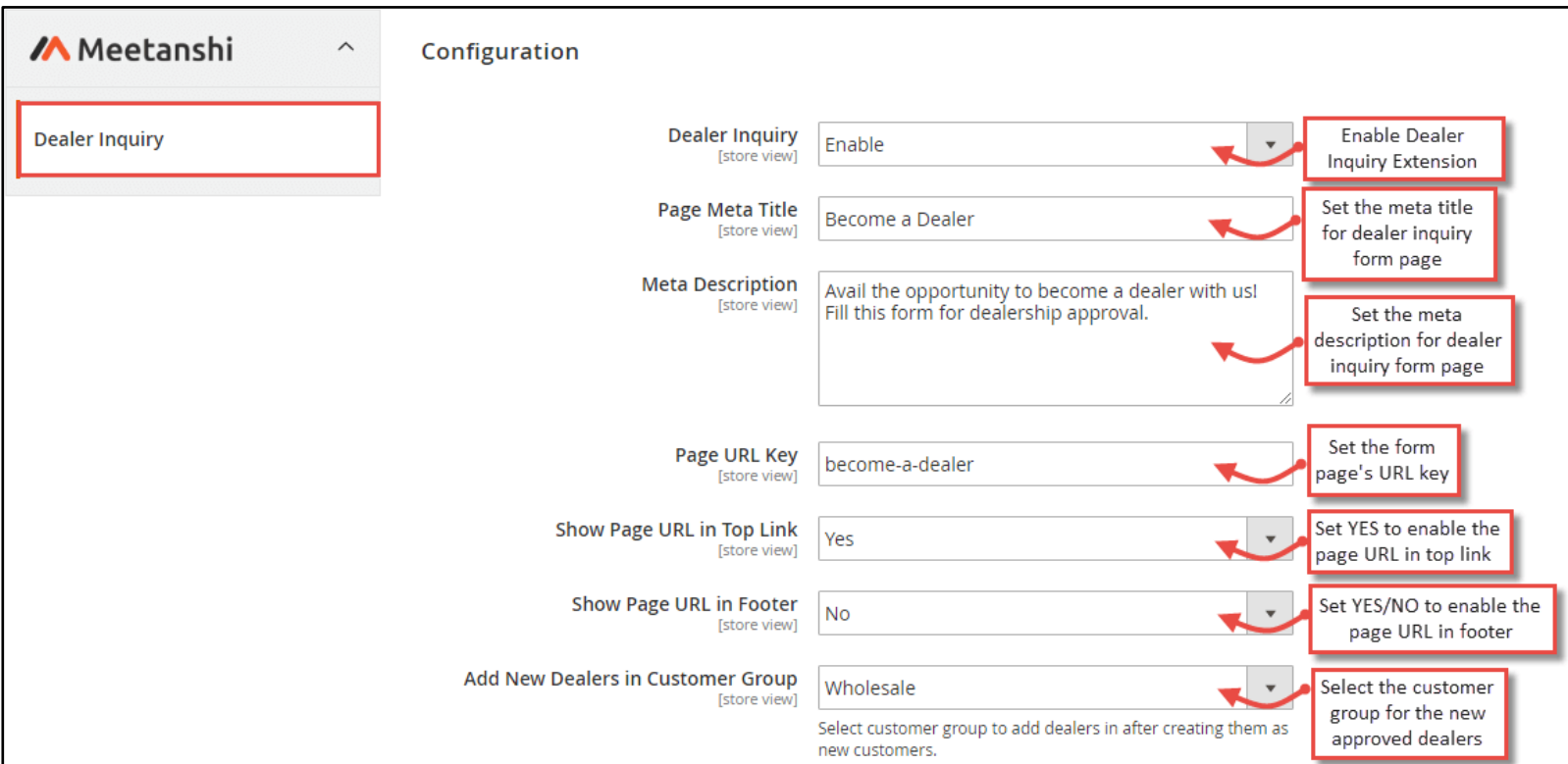
1. Extension Installation

- Create a folder structure in Magento root as app/code/Meetanshi/Inquiry
- Download and extract the zip folder and upload our extension files to the app/code/Meetanshi/Inquiry via FTP.
- Login to your SSH and run below commands step by step:
 - php bin/magento setup:upgrade
 - For Magento version 2.0.x to 2.1.x - php bin/magento setup:static-content:deploy
 - For Magento version 2.2.x & above - php bin/magento setup:static-content:deploy -f
 - php bin/magento cache:flush

2. Configuration

To configure the extension, login to Magento 2 backend, move to **Stores → Configuration → Dealer Inquiry** where you can find various settings to configure the extension.

- **Dealer Inquiry:** Enable the extension from here.
- **Page Meta Title:** Enter page meta title.
- **Meta Description:** Add page meta description to make it SEO friendly.
- **Page URL Key:** Enter the URL key for dealer inquiry form page.
- **Show Page URL in Top link:** Set YES if the page URL is to be displayed in the top link.
- **Show Page URL in Footer:** Set YES if the page URL is to be displayed in the footer.
- **Add New Dealers in Customer Group:** Select the customer group to add new dealer customer account for the approved dealers.



The screenshot shows the Magento 2 Configuration page for the Dealer Inquiry extension. The left sidebar has a menu with 'Dealer Inquiry' highlighted. The main content area shows the following settings:

- Dealer Inquiry** (store view): Enable (dropdown menu) - Callout: Enable Dealer Inquiry Extension
- Page Meta Title** (store view): Become a Dealer - Callout: Set the meta title for dealer inquiry form page
- Meta Description** (store view): Avail the opportunity to become a dealer with us! Fill this form for dealership approval. - Callout: Set the meta description for dealer inquiry form page
- Page URL Key** (store view): become-a-dealer - Callout: Set the form page's URL key
- Show Page URL in Top Link** (store view): Yes (dropdown menu) - Callout: Set YES to enable the page URL in top link
- Show Page URL in Footer** (store view): No (dropdown menu) - Callout: Set YES/NO to enable the page URL in footer
- Add New Dealers in Customer Group** (store view): Wholesale (dropdown menu) - Callout: Select the customer group for the new approved dealers

Below the 'Add New Dealers in Customer Group' setting, there is a note: "Select customer group to add dealers in after creating them as new customers."

3. Form Settings

- **Form Options**

- **Form Title:** Set the form title.
- **Form Description:** Enter the form description.
- **Submit Button Label:** Set the label for the submit button.
- **Form Submission Success Message:** Enter the message to be displayed on successful form submission.
- **Show Form Fields:** Select the form fields to enable it in the frontend.
- **Allowed Upload File Types:** Add the file types to be allowed to attach with the form.

Form Settings

Form Options

Form Title [store view] Dealer Inquiry Set the Form Title

Form Description [store view] Submit the form to apply for a new dealership account Enter the Form Description

Add text to show under the Dealer Inquiry form title.

Submit Button Label [store view] submit Set the label for submit button

Set label for form submit button.

Form Submission Success Message [store view] Your request has been submitted successfully. Enter the message to be displayed on successful form submission

Show Form Fields [store view] Tax/VAT Number Address Website Date Time Upload Files Extra Field 1 Extra Field 2 Extra Field 3 Select the form fields to enable it in the frontend

Select fields to show in dealer inquiry form.

Allowed Upload File Types [store view] jpeg,png Add the file types to be allowed to attach with the form

Add comma separated file extensions to allow file upload from the form(for e.g. jpeg,jpg,png).

- **Custom Form Labels**

Configure the form labels for all the form fields as shown here:

Custom Form Labels

Enter customized label text for various form fields here

First Name <small>[store view]</small>	First Name
Last Name <small>[store view]</small>	Last Name
Company Name <small>[store view]</small>	Company Name
Tax/VAT Number <small>[store view]</small>	Tax/VAT Number
Street Address <small>[store view]</small>	Street Address
City <small>[store view]</small>	City
State <small>[store view]</small>	State
Country <small>[store view]</small>	Country
Zip/Postal Code <small>[store view]</small>	Zip/Postal Code
Contact Number <small>[store view]</small>	Contact Number
Email <small>[store view]</small>	Email
Website <small>[store view]</small>	Website
Description <small>[store view]</small>	Description
Date Time <small>[store view]</small>	Date Time
Upload Files <small>[store view]</small>	Upload Files
Extra Field 1 <small>[store view]</small>	
Extra Field 2 <small>[store view]</small>	
Extra Field 3 <small>[store view]</small>	

4. New Dealer Inquiry Email Settings

Whenever a new dealer inquiry is submitted from the frontend, admin gets an Email based on the below settings.

- **Email Template:** Select the Email Template from the drop-down menu.
- **Email ID of Admin:** Input the Email ID of Admin.

New Dealer Inquiry Email Settings

Email Template <small>[store view]</small>	Dealer Inquiry-Admin Email(Default)	Select the Email Template from dropdown menu
Email ID of Admin <small>[store view]</small>		Input the Email ID of Admin

5. Dealer Inquiry Successful Submission Email Settings

Refer the settings below for dealer inquiry successful submission Email to the customers.

- **Email Sender:** Select the Email Sender from the dropdown.
- **Email Template:** Select the Email Template for successful submission Email.

Dealer Inquiry Successful Submission Email Settings

Email Sender <small>[store view]</small>	General Contact	Select the Email Sender from the dropdown
Email Template <small>[store view]</small>	Dealer Inquiry-Customer Submit Form Email(Select the Email Template for successful submission Email

6. New Dealer Account Registration Email Settings

Configure the new dealer account registration Email settings to send credentials to the newly created dealer accounts.

New Dealer Account Registration Email Settings

Email Sender <small>[store view]</small>	Sales Representative	Select the Email Sender from dropdown
Email Template <small>[store view]</small>	Dealer Inquiry-Create Customer Email(Default)	Select the Email Template for registration Email

7. GDPR Compliance Notice Settings

The module is compatible with EU's GDPR after the following settings are configured:

- **GDPR Compliance Notice in Form:** Enable the GDP Compliance Notice in the form.
- **Notice Text:** Add the custom text for GDPR Compliance notice.

GDPR Compliance Notice Settings


GDPR Compliance Notice in Form <small>[store view]</small>	Enable	Enable the GDPR Compliance Notice in the form
Notice Text <small>[store view]</small>	All information received by us from your registration will be used in accordance with our Privacy Policy.	Add the custom text for GDPR Compliance notice

8. Google reCAPTCHA Settings

Enable Google reCAPTCHA in the dealer inquiry form to avoid spam inquiries.

- **Google reCAPTCHA:** Enable the [Google reCAPTCHA v3](#).
- **Site Key:** Enter the site key obtained while registration with Google reCAPTCHA.
- **Secret Key:** Enter the secret key obtained while registration with Google reCAPTCHA.

Google reCAPTCHA Settings

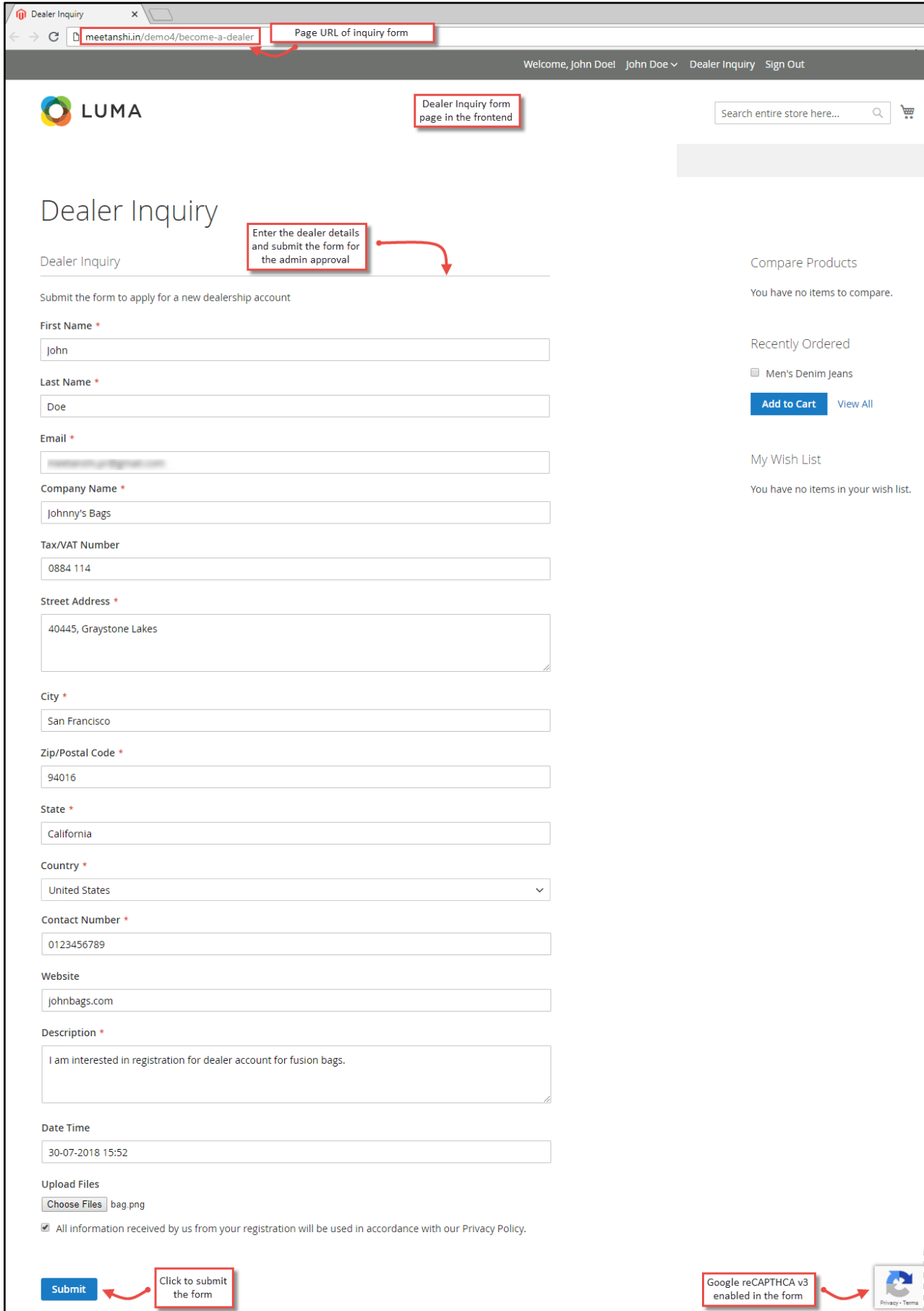
Google reCAPTCHA <small>[store view]</small>	Enable		Enable the Google reCAPTCHA
Site Key <small>[store view]</small>	<input type="text"/>		Enter the Site Key obtained while registration with Google reCAPTCHA v3
Secret key <small>[store view]</small>	<input type="text"/>		

Register with [Google reCAPTCHA](#) to get your site key.

9. Dealer Inquiry in Frontend

Once the settings are configured properly, the Admin and Customer gets Emails for notification of new dealer inquiry and successful form submission.


- **Dealer Inquiry Form in Frontend**
The dealer inquiry form is displayed with Google reCAPTCHA enabled as shown here. Also, the URL key is displayed as set from the backend. The user can submit the form with Submit button.



The screenshot shows a web browser window with the URL `meetanshi.in/demo4/become-a-dealer`. The page title is "Dealer Inquiry" and the user is logged in as "John Doe". The LUMA logo is visible in the top left. A search bar and a shopping cart icon are in the top right. The main content area contains a "Dealer Inquiry" form with the following fields: First Name (John), Last Name (Doe), Email, Company Name (Johnny's Bags), Tax/VAT Number (0884 114), Street Address (40445, Graystone Lakes), City (San Francisco), Zip/Postal Code (94016), State (California), Country (United States), Contact Number (0123456789), Website (johnbags.com), and Description (I am interested in registration for dealer account for fusion bags.). The form also includes a "Date Time" field (30-07-2018 15:52), an "Upload Files" section with a "Choose Files" button and a file named "bag.png", and a checkbox for the privacy policy. A "Submit" button is at the bottom left. Annotations include: a red box around the URL with the text "Page URL of inquiry form"; a red box around the LUMA logo with the text "Dealer Inquiry form page in the frontend"; a red box around the form title with the text "Enter the dealer details and submit the form for the admin approval"; a red box around the "Submit" button with the text "Click to submit the form"; and a red box around the reCAPTCHA icon with the text "Google reCAPTCHA v3 enabled in the form".

- **Email to Admin on New Dealer Inquiry**
The image shows the Email received by the admin when a new dealer inquiry form is submitted to notify admin for the same.

New Dealer Inquiry Received Inbox x

 **John Doe** via meetanshi.in
to me ▾


Email received by the admin when a new dealer inquiry is received

3:56 PM (5 minutes ago) ☆ ↶ ▾

Hello Admin,

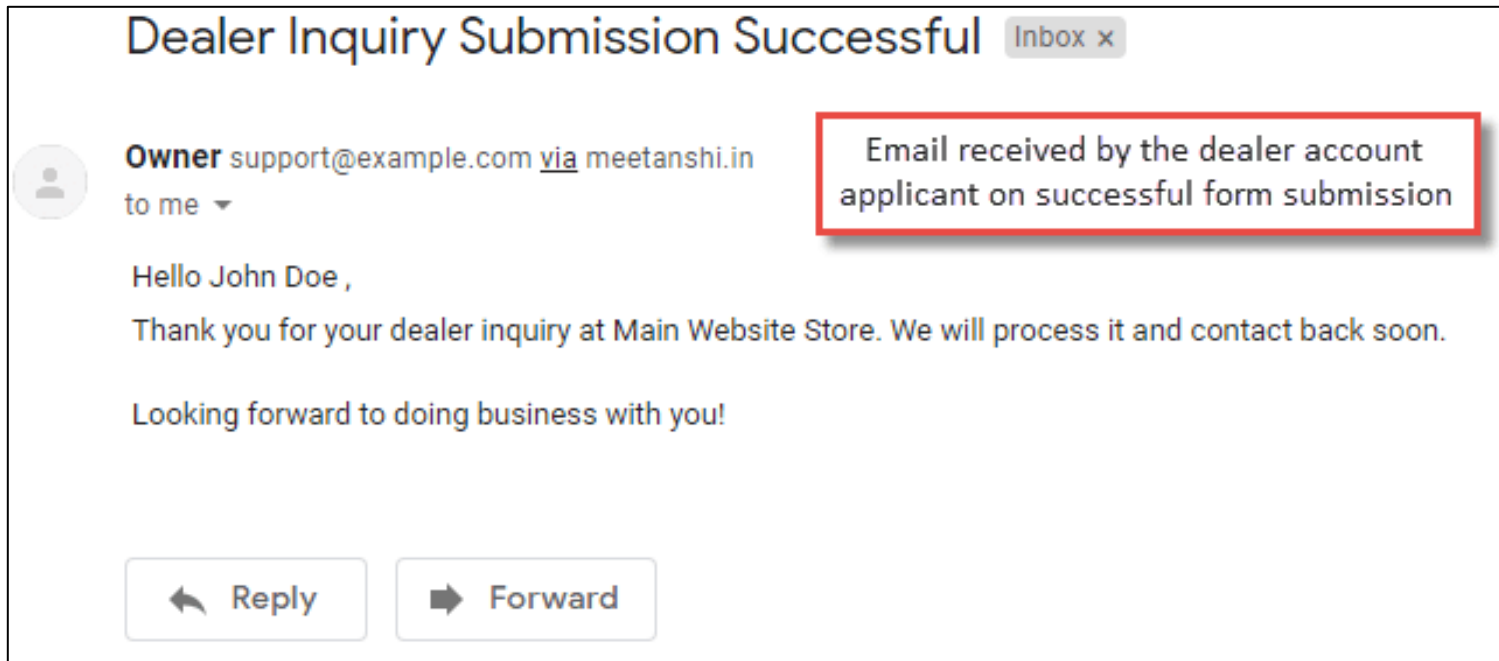
You have received a new dealer inquiry with below details.

First Name: John
Last Name: Doe
Email: meetanshi.pr@gmail.com
Company Name: Johnny's Bags
Address: 40445, Graystone Lakes
City: San Francisco
Zip/Postal Code: 94016
Country: United States
State/Province: California
Contact Number: 0123456789
Website: johnbags.com
Business Description: I am interested in registration for dealer account for fusion bags.
Date & Time: 30-07-2018 15:52
Uploaded Files: bag.png



- **Email to Customers on Successful Inquiry Submission**

The image shows the Email sent to customers to notify them about the successful inquiry submission.



Dealer Inquiry Submission Successful Inbox x

Owner support@example.com via meetanshi.in
to me ▾

Email received by the dealer account applicant on successful form submission

Hello John Doe ,

Thank you for your dealer inquiry at Main Website Store. We will process it and contact back soon.

Looking forward to doing business with you!

Reply Forward

10. Manage Dealer Inquiries in Backend

The module supports a backend grid from where the admin can manage new dealer inquiries. The grid is updated on a new dealer inquiry form submission. Admin can add a new dealer inquiry from here.

Manage Dealer Inquiries

Backend Grid to manage the Dealer Inquiries
Dealer-Inquiry ▾

Click to create new dealer inquiry → Add Dealer Inquiry

Filters | Default View ▾ | Columns ▾

Actions ▾ 2 records found
20 per page | 1 of 1

☐	Dealer ID	First Name	Last Name	Email ID	Is Customer Created	Store View	Action
<input type="checkbox"/>	9	John	Doe	[Redacted]	NOT CREATED	Main Website Main Website Default Sto	<div style="border: 1px solid #ccc; padding: 2px;"> Click to edit the dealer inquiry, create customer or delete the dealer </div> <div style="border: 1px solid #ccc; padding: 2px; margin-top: 5px;"> Select ▾ Edit Inquiry Create Customer Delete Dealer </div>
<input type="checkbox"/>	10	Jimmy	Doe	[Redacted]	CREATED	Main Website Main Website Store Default Store View	

- The admin can view, edit, save its details, delete dealer and create a customer using the “**Edit Inquiry**” action.

Admin can view, edit and save dealer inquiry from here

Dealer Inquiry

← Back Delete Dealer Create Customer Save

Click to delete dealer or create new dealer customer

Dealer Information

First Name * John

Last Name * Doe

Email ID *

Company Name * Meetanshi

Tax/VAT Number *

Address * 6146 Honey Bluff Parkway

City * Los Angeles

Postal Code * 90001

Country * United States

State *

Contact No * 9123456789

Business Description * I'm interested in doing business with you, kindly approve my dealership account.

Select Image No file chosen
Allow image type: jpg, jpeg, gif, png

Extra Field 1

Extra Field 2

Extra Field 3

Store View
All Store Views
Main Website
Main Website Store
Default Store View

Customer Created No