

Email Quote for Magento 2

User Guide

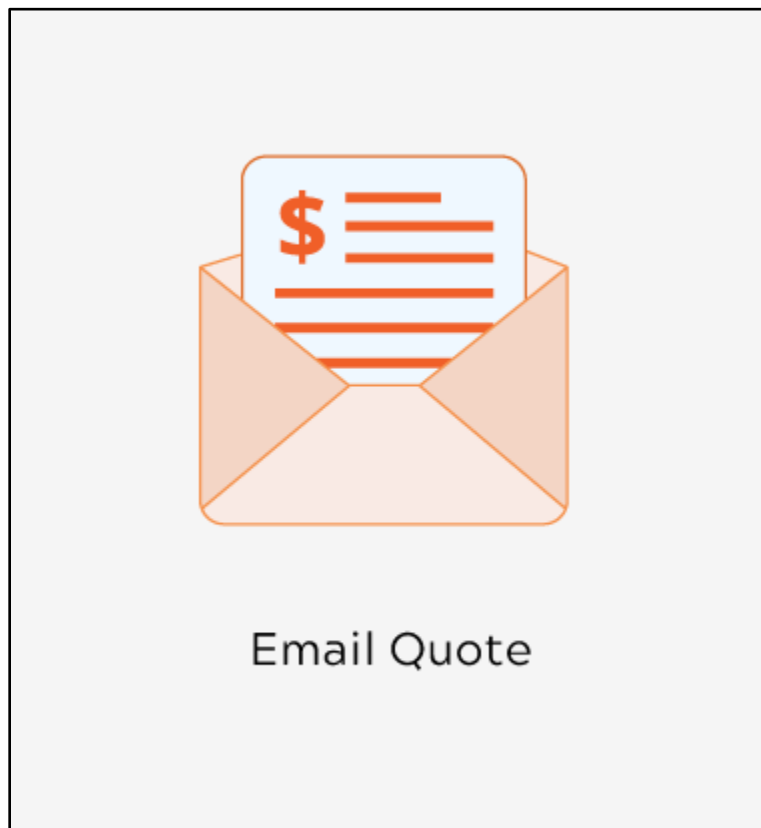


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1. Extension Installation

- Find the Composer name and version of the extension in the extension's composer.json file.
- Login to your SSH and run:
 - `composer require meetanshi/magento2-email-quote`
- Enter your [authentication keys](#). Your public key is your username; your private key is your password.
- Wait for Composer to finish updating your project dependencies and make sure there aren't any errors.
- To verify that the extension installed properly, run the command:
 - `php bin/magento module:status Meetanshi_Savequote`
- By default, the extension is probably disabled.
- Enable the extension and clear static view files:
 - `php bin/magento module:enable Meetanshi_Savequote --clear-static-content`
 - `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, move to **Email Quote** → **Configuration** where you can find various settings to enable the extension.

- **Email Quote:** Enable the Email Quote extension from here.
- **Email Quote Label:** Set custom label for the Email quote button on cart page.
- **Button Color:** Set the color of the Email Quote button on cart page.
- **Button Text Color:** Set the text color of the Email Quote button on cart page.
- **Button Border Color:** Set the border color of the Email Quote button on cart page.

Configuration

Store View: Default Config ? Save Config

MEETANSHI Configuration

Email Quote

Email Quote [store view] Enable Enable Email Quote extension from here

Email Quote Label [store view] Send Quote Enter custom label for the Email quote button on the cart page
Label of button for customers to request quotes

Button Color [store view] #006bb4 Set background, text and border color for Email Quote button on cart page

Button Text Color [store view] #fff

Button Border Color [store view] #ccc

3. Email Quote Settings

- **For Admin**

Configure the settings to get the email quote notifications for the new inquiries submitted by the customers.

- **Email ID of Admin:** Enter the Email ID of the admin to receive new quote.
- **Admin Email Template:** Select the template for the new quote inquiry email.
- **Email Sender:** Select the sender for the new quote inquiry email.

Email Quote For Admin

Email ID of Admin [store view] Enter Email ID of the admin to receive new quote inquiries
Email ID on which you want to receive quotes

Admin Email Template [store view] Admin Send Quote Email (Default) } Select Email template and sender for the new quote inquiry Email

Email Sender [store view] General Contact }

- **For Customers**

Configure the module for customers to receive the successful quote inquiry submission Emails.

- **Customer Groups:** Select the customer groups to which to allow requesting quotes from the frontend.
- **Success Email Template:** Select Email template for quote submission success Email.
- **Customer Email Template:** Select the email template to notify customers when the admin sends the quote to the customers.
- **Email Sender:** Select the Email sender.

Email Quote For Customer

Customer Groups [store view] NOT LOGGED IN, General, Wholesale, Retailer } Select customer groups to show the Email quote button to the selected customers
Email Quote button will be displayed for selected customer groups only.

Success Email Template [store view] Customer Success Email (Default) } Select Email template for quote submission success Email
Success Template which Customers will Receive

Customer Email Template [store view] Admin Send Edit Quote Email (Default) } Select Email template for quote to customers

Email Sender [store view] General Contact } Select Email sender

4. PDF Attachment Settings

The extension allows to attach PDF files with emails by configuring the below settings:

- **PDF Attachment:** Enable PDF attachment to send quote in Email.
- **PDF footer Text:** Set custom footer text for PDF.

PDF Attachment Settings

PDF Attachment <small>[store view]</small>	Enable	Enable PDF attachment to send quote in Email
	Enable to send quote PDF as an attachment with Email.	
PDF Footer Text <small>[store view]</small>	Meetanshi	Set custom footer text for PDF

5. Google reCAPTCHA Settings

To enable the [Google reCAPTCHA v3](#) with the Email Quote inquiry form, simply [register](#) with it to get the site key and secret key.

- **Google reCAPTCHA:** Enable Google reCAPTCHA on the email quote inquiry form.
- **Site Key:** Enter the site key obtained during the registration for Google reCAPTCHA v3.
- **Secret Key:** Enter the secret key obtained during the registration for Google reCAPTCHA v3.

Google reCAPTCHA Settings

Google reCAPTCHA <small>[store view]</small>	Enable	Enable Google reCAPTCHA
	select to enable google reCAPTCHA in quote inquiry form.	
Site Key <small>[store view]</small>		Enter the site key obtained during the registration
	Register with Google reCAPTCHA to get your site key.	
Secret key <small>[store view]</small>		Enter the secret key obtained during the registration
	Register with Google reCAPTCHA to get your site key.	

6. Privacy Checkbox Settings

For GDPR compliance, the extension offers privacy checkbox feature that can be configured as below:

- **Privacy Checkbox:** Enable the privacy policy checkbox in quote inquiry form.
- **Privacy Notice Text:** Add custom privacy policy text to show besides the privacy checkbox.
- **Privacy Policy Redirection Page:** Select page to redirect users to read privacy policy prior agreeing.

Privacy Checkbox Settings

Privacy Checkbox <small>[store view]</small>	Enable <small>Enable to force users agree privacy policy prior submitting quote inquiries.</small>	Enable privacy policy checkbox in quote inquiry form
Privacy Notice Text <small>[store view]</small>	I agree to Terms and Conditions	Add custom privacy policy text
Privacy Policy Redirection Page <small>[store view]</small>	Privacy and Cookie Policy	Select page to redirect users to read privacy policy prior agreeing


7. Email Quote in Frontend

Once the extension is configured, customers can send quote inquiry to admin from the cart page using the quote inquiry form as shown here.

- **Email Quote Button on Cart Page**

The extension enables the “Send Quote” button with the custom text and layout on the cart page.

The screenshot displays the LUMA Shopping Cart interface. At the top right, it shows the user name 'John Doe' and the currency 'USD - US Dollar'. The main navigation bar includes 'Review Import Export', 'Currency Switcher', and 'Email Quote'. The cart title is 'Shopping Cart'. A blue button labeled 'Send Quote' is highlighted with a red box. A red callout box points to this button with the text: 'Click to open quote inquiry form, fill the details and submit inquiry'. Another red box highlights the 'Email Quote' link in the navigation bar with the text: 'Email Quote button on cart page with custom text and preferred background, text and border color'. The cart contains one item: 'Woodland Wallet' with a price of \$39.00 and a quantity of 100, resulting in a subtotal of \$3,900.00. A 'Summary' panel on the right shows the subtotal (\$3,900.00), shipping (\$500.00), and an order total of \$4,400.00. A 'Proceed to Checkout' button is visible in the summary panel. At the bottom of the cart, there is an 'Update Shopping Cart' button.

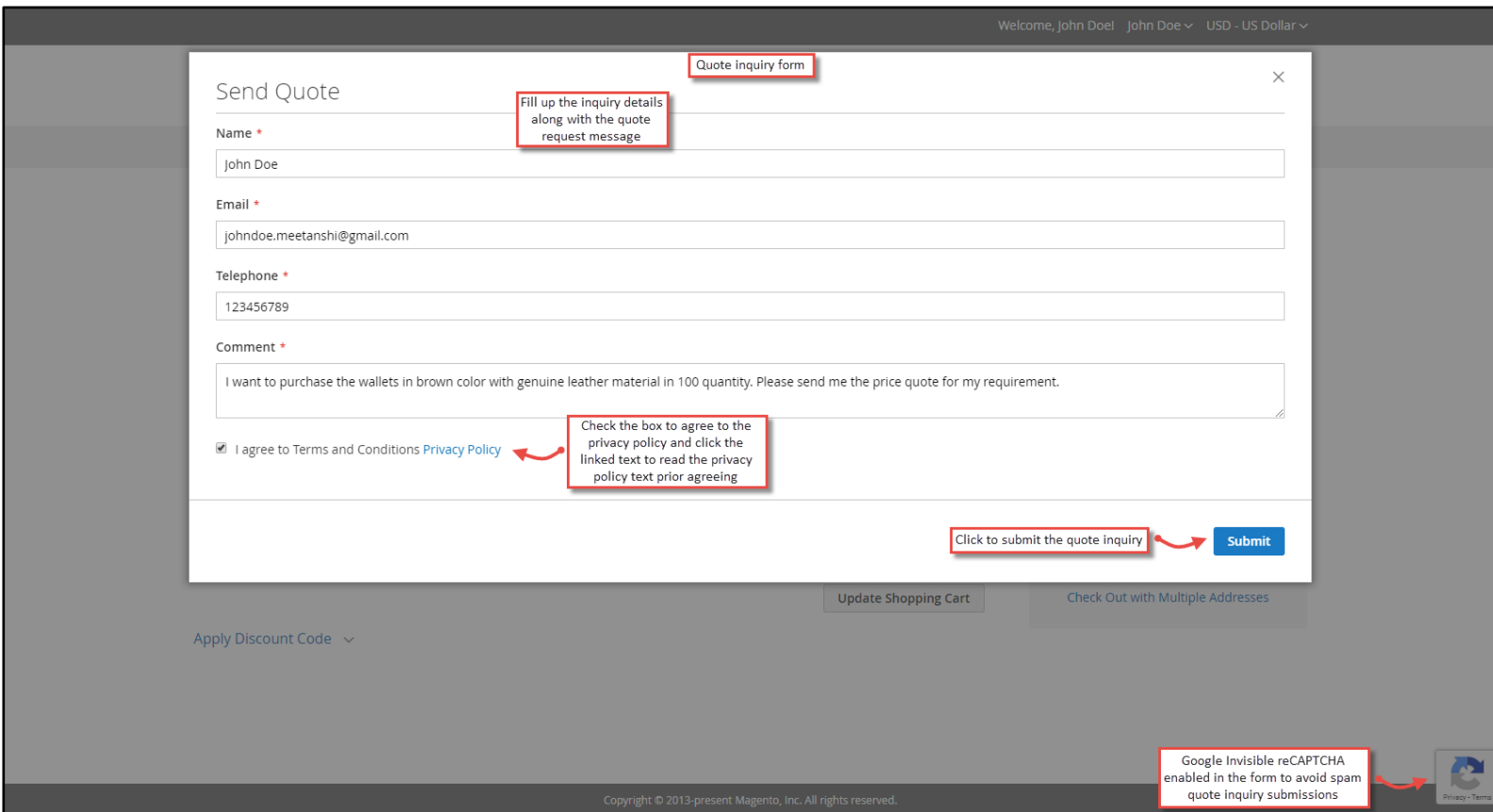
Item	Price	Qty	Subtotal
 Woodland Wallet	\$39.00	100	\$3,900.00

Summary

Subtotal	\$3,900.00
Shipping (Flat Rate - Fixed)	\$500.00
Order Total	\$4,400.00

- **Quote Inquiry Form**

On the click of “Send Quote” button from the cart page, the quote inquiry form opens up from where the users can fill the details and add the quote request message. If the privacy policy agreement checkbox is enabled, users have to agree the same by checking the box. The users can also read the privacy policy text from the link given in the form. If Google reCAPTCHA is enabled, the badge gets shown on the form. After filling all the details, users can click to submit the quote inquiries.




8. New Quote Inquiry Email to Admin

Once the quote inquiry is submitted by the user, the admin receives an email notification. The admin can access all the details and PDF attachments for quote inquiry.

CartEstimate.pdf
45.72 KB

New quote inquiry request
Email to admin with
requirement details and
PDF attachment

 LUMA

Hello Admin,


You have received new quote inquiry as bellow.

Name : **John Doe**

Email : **johndoe.meetanshi@gmail.com**

Phone : **123456789**

Message : I want to purchase the wallets in brown color with genuine leather material in 100 quantity. Please send me the price quote for my requirement.

Product Image	Item	SKU	Qty	Total
	Woodland Wallet	Woodland Wallet	100	\$3,900.00

Grand Total : \$3,900.00


Thank you again

9. Quote Inquiry Success Email to Users

The users also get acknowledged through email about successful submission of their quote inquiries submission.

Owner [redacted] via meetanshi.in

Quote inquiry submission success
Email to users


 LUMA

Hello John Doe,

Thank you for submitting your quote request with us.

Your quote request #15, is being reviewed by one of our representatives.

Message : I want to purchase the wallets in brown color with genuine leather material in 100 quantity. Please send me the price quote for my requirement.

Product Image	Item	SKU	Qty	Total
	Woodland Wallet	Woodland Wallet	100	\$3,900.00

Grand Total : \$3,900.00

Thank you again

10. Email Quote in “My Accounts”

The quote inquiries submitted by the customers are enlisted in the “My Accounts” section under “My Saved Quotes” tab along with the its status.

Account Dashboard

My Orders

My Downloadable Products

My Wish List

Address Book

Account Information

Stored Payment Methods

Billing Agreements

My Product Reviews

Newsletter Subscriptions

My Saved Quotes

My Saved Quotes

2 Item(s) All the quotes for which customer has requested are enlisted here with their status Show 5 per page

Quote ID	Product SKU	Message	Grand Total	Status
14	Men's T shirt	I want 100 quantities for Tshirt in 5 different colors, please provide me the quote for the same.	\$10000.00	Inquired
15	Woodland Wallet	I want to buy both of these with bulk quantities, please provide me the quote.	\$3000.00	Ordered

2 Item(s) Show 5 per page



11. Email Quote in Backend

- **Manage Quotes from Backend**

The extension offers backend grid for the admin to easily manage the quote inquiries. The grid allows to edit and send Email quote to users and check the status of each inquiry easily.

Manage Quotes Manage quotes from the backend

Search by keyword Filters Default View Columns Export

Actions 3 records found 20 per page 1 Click to edit and Email quote to users

ID	Customer Name	Customer Email	Product SKU	Telephone	Comment	Order Total	Created At	Status	Action
14	John Doe	johndoe.meetanshi@gmail.com	Men's T shirt	123456789	I want 100 quantities for Tshirt in 5 different colors, please provide me the quote for the same.	\$10.00	2018-12-28 05:37:26	Emailed	Edit Quote
15	John Doe	johndoe.meetanshi@gmail.com	Woodland Wallet	1326546	I want to buy both of these with bulk quantities, please provide me the quote.	\$3,000.00	2018-12-28 06:29:21	Ordered	Edit Quote
16	John Doe	johndoe.meetanshi@gmail.com	Woodland Wallet	123456789	I want to purchase the wallets in brown color with genuine leather material in 100 quantity. Please send me the price quote for my requirement.	\$3,900.00	2018-12-28 09:25:49	Inquired	Edit Quote

Note: All the quote inquiries with user details and status enlisted here

- **Send Email Quote from backend**

On click of the “Edit Quote” action from the grid, admin can add products, set the quantity, set custom price, apply discount and click “Email Quote” button to send customers the quote through email.

Create New Order for John Doe in Default Store View Send quote to customer from backend

Cancel **Email Quote** **Submit Order**

Order Currency: US Dollar

Customer's Activities

Shopping Cart (1)

Item	Qty	Price
Woodland Wallet	100	\$39.00

Clear Shopping Cart

Wish List (0)

No items

Items Ordered

Product	Price	Qty	Subtotal	Discount	Row Subtotal	Action
Woodland Wallet SKU: Woodland Wallet	\$32.00 Custom Price* 32.00	100	\$3,200.00	\$0.00 Apply	\$3,200.00	Please select
Total 1 product(s)		Subtotal:	\$3,200.00	\$0.00	\$3,200.00	

* - Enter custom price excluding tax

Apply Coupon Code

Account Information

Group: General Email: johndoe.meetanshi@gmail.com

Update Items and Quantities

Note: Prepare quote as per request and click to Email the quote to customers for purchase



12. Order Quote to User in Email

Immediately after the admin emails the quote from the backend, the customer can easily make the purchase using the link sent in email and directly proceed to checkout.

New Quote Inbox x Quote in Email to users

luma@meetsanshi@gmail.com to me 12:06 PM (1 minute ago) ☆ ↶ ⋮

LUMA

Hello John,

Thank you for your interest in our product(s).

Your quote request #10 is ready. Please click checkout button to place the order.

Billing Info	Shipping Info
Jimmy Doe 6146 Honey Bluff Parkway Calder Michigan 49628-7978 United States T: 5552293326	Jimmy Doe 6146 Honey Bluff Parkway Calder Michigan 49628-7978 United States T: 5552293326
Payment Method	Shipping Method
Check / Money order	Flat Rate - Fixed

Product Image	Item	SKU	Qty	Total
	Men's Tshirt	Men's Tshirt	50	\$6,500.00

SubTotal : \$6,500.00
Shipping & Handling : \$250.00
Tax : \$0.00
Grand Total : \$6,750.00

Click to load the cart and checkout products directly [CHECKOUT](#)

Thank you again

[CartEstimate.pdf](#) PDF attachment with quote Email