

Standard Quotes mode

Overview

Standard Quotes mode offers a simple way to use the Commerce Vision platform ordering process to initiate ERP-maintained quotes. A standard quote (with no freight) your customer creates on your website is automatically sent to the ERP for review and editing by your sales/customer service team. They may want to adjust pricing, add freight cost, check stock, etc. After the quote is finalised and freight added in the ERP, it is converted to a sales order and re-integrated to your website. Your customer can accept the quote by submitting it as an order. If it is not accepted by the expiry date, the quote will become invalid.



NOTE - Freight options from your website are never added to a standard quote. Freight cost must be added in the ERP. The online approvals feature cannot be used with this mode.

Configuration

Pronto ERP: Self-configurable after Quotes feature enabled by Commerce Vision.

Other ERPs: Talk to Commerce Vision for custom implementation.



Use [Standard & Approved quote mode](#) if your business quoting requirements need one or more of these features:

- integration with Commerce Vision online [approvals](#)
- quote expiration functions
- [Quote Review](#) functions

On this page:

- [Overview](#)
 - [Configuration](#)
- [Customer Experience](#)
- [Configure Standard Quote mode](#)
 - [1. Enable Request Quote for a Role](#)
 - [2. Set Order Quoting Mode to Standard](#)
 - [3. Add Cart Quote Button Widget](#)
 - [4. Edit email templates \(optional\)](#)
 - [5. Change Quote Submitted message \(optional\)](#)
- [Related help](#)
 - [Related widgets](#)

Customer Experience

1. On the cart page, the customer clicks **Request Quote** in the order line header or the **Request Quote** button.

A [Request Quote button](#) can be placed in any zone on the page. In our example, we added it next to 'Continue to Checkout'. This makes it clear to the user that they can choose to create a quote of out of their cart contents instead of an order.

Shopping Cart

Please review your cart before checkout.

[Notify Me When In Stock](#) [Save As Template](#) [Hold Order](#) [Update Order](#) [Remove All](#) [Request Quote](#)

Product	Qty	Price (ex GST)	Unit	Total
 Bush Round Meeting Table Code: CV345 Out Of Stock	5	\$325.00	Each	\$1,6
Add Note Add to Favourites Update Remove Notify Me When Back In Stock				

Subtotal (inc GST) \$38.49

Total (inc GST) \$38.49

Includes GST of \$3.50



Continue To Checkout



Request Quote

2. The customer selects **Request Quote** to create the quote. The quote submission is acknowledged in the quote conclusion page.

Your quote request has been submitted to Commerce Vision. We will get back to you shortly. Thank you.

3. The customer receives a 'Quote Confirmation' email. The email recipient in your organisation assigned to quote notifications receives the 'Quote Submitted' email.

Quote Confirmation email (to customer user)

Quote Submitted email (to staff u



Quote Confirmation #100013021

Thanks so much for your quote request!

A member of our Customer Service team will review it and be in touch with you shortly.

Order Summary

Item	Qty	Price (inc GST)	Unit	Discount	Total (inc GST)
 Gray-Nicolls Test Special Cricket Ball Code: CV122	1	\$20.90	Each	0.00%	\$20.90
Subtotal (inc GST)					\$20.90
Freight					No Charge
Total (inc GST)					\$20.90
Including GST					\$1.90



Quote Submitted

Quote Order Number	100
Customer Details	A &
Entered by User	Sara
User email Address	sara@commercevision.co.uk
Quote Total	20.90

Order Summary

Item	
 Gray-Nicolls Test Special Cricket Ball Code: CV122	

4. When the finalised quote is reintegrated online, the customer is alerted by email.

5. On the [Order History](#) page, your customer can view the quote and convert it to an order. **NOTE** - They may need to enter the quote's invoice number in the Invoice/Order Number field.



Order History

Check the status of your order

Search Range

Invoice / Order Number

Search

Advanced Search

Order Status	Order Date (start)	Order Date (end)	Your Reference	Product Search
Outstanding Orders	01/08/2017	17/08/2017		
☒ Show Only My Orders (Katie B2B Koss)				
Search				

Search Results

4 records (1 page)

Order No.	Entered By	Order Date	Customer Code	Status	Your Ref	Total (ex)	Options
20384		17/08/2017	ABC	Quotation		\$199.47	☐ Reprint Invoice View
20383		17/08/2017	ABC	Quotation		\$147.23	☐ Reprint Invoice View
20382		17/08/2017	ABC	Quotation	4	\$70.54	☐ Reprint Invoice View
20360		14/08/2017	ABC	On Hold	TEST	\$2,089.98	☐ Reprint Invoice View

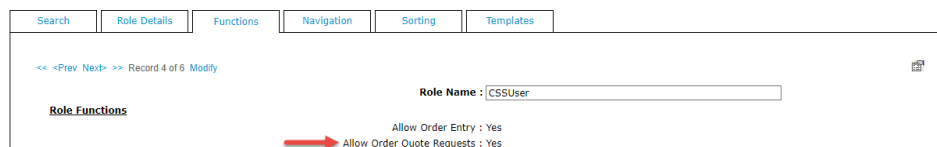
Configure Standard Quote mode

This guide assumes Commerce Vision has enabled Quotes for your website.

1. Enable Request Quote for a Role

Regardless of which quote mode has been implemented on your site, every Role that can make quote requests must be individually enabled for quoting.

1. In the CMS, go to **E-Commerce Users Roles**.
2. **Select the Role** you'd like to update (e.g. 'CSSUser'). The page will refresh to display role details.
3. Select the **Functions** tab and click **Modify**.
4. Set **Allow Order Quote Requests** to **Yes**.



The screenshot shows the 'Role Functions' tab for the 'CSSUser' role. The 'Allow Order Quote Requests' checkbox is checked and highlighted with a red arrow. The 'Allow Order Entry' checkbox is also checked.

5. Click **OK** to save.

2. Set Order Quoting Mode to Standard



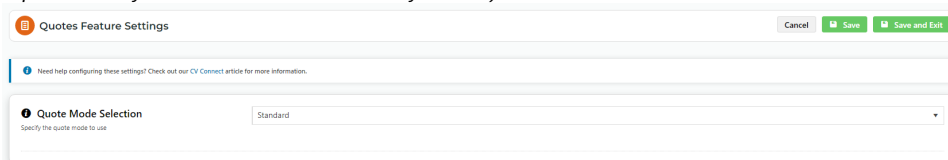
Quote requests in the standard quote mode will **not** automatically include freight charges. If this is required, another quote mode must be implemented.

1. In the CMS, go to **Settings Settings Feature Management Payment & Checkout**.
2. Scroll down to **Quotes** and ensure it is toggled **ON**.



The screenshot shows the 'Feature Management' page with the 'Quotes' feature toggled ON. The 'Configure' button is visible next to the toggle.

3. Click **Configure**.
4. In **Quote Mode Selection**, select 'Standard'. (**NOTE** - While there are other options in the lookup, each one must be implemented by Commerce Vision to work on your site.)



The screenshot shows the 'Quotes Feature Settings' page. The 'Quote Mode Selection' dropdown is set to 'Standard'.

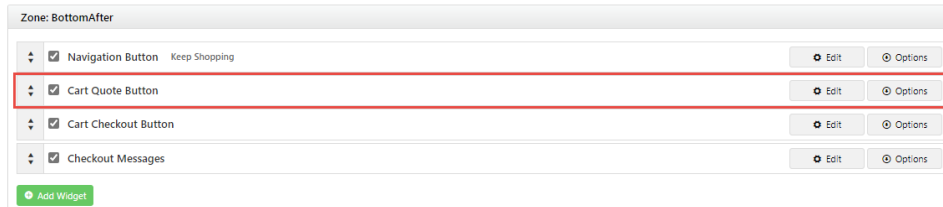
5. Click **Save** or **Save & Exit**.

3. Add Cart Quote Button Widget

This step renders the Quote Request button. (It may have been completed during implementation.)

1. In the CMS, go to **Content Pages & Templates Checkout Cart**.

2. In the zone the button is to display, click **Add Widget**.
3. Find the **Cart Quote Button Widget**, then click **Add Widget**.
4. Edit options. See: [Cart Quote Button Widget](#).
5. Click **Save**. **TIP** - You can drag and drop the widget to another position in the zone.



4. Edit email templates (optional)

The Quote Confirmation and Standard Quote Submitted email templates can be edited.

1. In the CMS, go to **Content Emails**.
2. Search for 'quote' to find these templates:
 - **Quote Confirmation** - the email to customer quote request made
 - **Standard Quote Submitted** - the email to internal staff that a quote request has been made



3. Select the email template to edit.
4. Edit existing widgets. You can also add other widgets. In this example, a [Static Content Widget](#) was added to display the 'thank you' text.



Quote Confirmation #100011876

Thanks so much for your quote request!

A member of our Customer Service team will review it and be in touch with you shortly.

Order Summary

Item	Qty	Price (ex GST)	Unit	Discount	Total (ex GST)
 HON Rectangular Conference Table Code: CV346	2	\$450.00	Each	0.00%	\$900.00
Subtotal (ex GST)					\$900.00
Freight				To Be Confirmed	
Plus GST					\$90.00
Total (inc GST)					\$990.00

Delivery Address

Affaire
Shop 150
Garden City Shopping Centre
Riseley Street
BOORAGOON WA
6154 Australia

5. Change Quote Submitted message (optional)

[Home](#) > [Order Complete](#)

Your quote request has been submitted to Commerce Vision. We will get back to you shortly. Thank you.

To change the quote submitted message from the default: 'Your quote request has been received. Thank you.', edit the resource: rcQuoteRequestSubmitted

See: [Customise Popup Messages](#)

Additional Information

Minimum Version Requirements	4.17
Prerequisites	--
Self Configurable	Yes
Business Function	Ordering
BPD Only?	Yes
B2B/B2C/Both	B2B
Third Party Costs	n/a

Related help

- [Freight Recalculation from Quote Review](#)
- [Quotes](#)
- [Online Quotes mode](#)
- [Standard and Approved Quotes mode](#)
- [Quote Review](#)
- [Quote Requests - Classic sites](#)

Related widgets

- [Quote Submitted Message Widget](#)