

Quotes

Overview

When dealing with small and medium-sized enterprises (SME), trade, government departments and international customers, a quotation function can offer additional value not generally available on B2C websites. There are many reasons for a trade user to create a quote. Some may be related to:

- **Compliance** - they need quotes from different suppliers as part of corporate governance; they may also use this as a form of approval as a part of their internal buying procedure.
- **Assistance request** - they want to buy a specific product but are unsure if accessories or consumables etc are required. A quotation can be an opportunity for your sales staff to upsell and convert a quote into an order.
- **Freight request** - the customer wants to buy a product and would like to confirm the shipping costs and lead time before proceeding.
- **Better pricing** - the customer wants to buy a large quantity of multiple items and would like a sales rep to review for better prices;
 - Or they may have seen a competitor's product but would prefer to buy yours if you can price match or start a conversation about why your product is better. (**NOTE** - Adjustment of pricing must currently be done in the ERP and the quote re-integrated.)

Quote Modes



Quotation modes available

Which quote mode your ecommerce site should implement depends on the combination of several factors, e.g., is quoting to be done in the ERP or online, what ERP is used, how freight should be handled, and whether to allow customers to use an approval process. If your business uses Pronto, the standard mode can be self-configured. All options need consultation with Commerce Vision.

- **standard**: can be self-configured by Admin (if used with Pronto). Access is set by Role. Note that freight is not calculated in the quote.
- **standard and approved**: standard mode integrated with the online [approvals](#) feature
- **standard and Pronto approved**: standard mode integrated with Pronto quote approval system
- **advanced with freight**: this mode includes freight calculations customised to your specific freight solution
- **Pronto approved**: (for use with Pronto only) - this mode integrates with the Pronto quote approval system
- **Pronto freight approved**: (for use with Pronto only) - this mode integrates with the Pronto freight system
- **online only**: a mode that is completely maintained on your Commerce Vision website
- **online with approved**: the online mode integrated with the online [approvals](#) feature

*Solutions that integrate with non-Pronto ERPs can also be implemented.

Additional Information

Minimum Version Requirements	4.17
Prerequisites	--
Self Configurable	No
Business Function	Ordering
BPD Only?	Yes
B2B/B2C/Both	Both
Third Party Costs	n/a

Related help

- [Freight Recalculation from Quote Review](#)
- [Online Quotes mode](#)

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

Related widgets

- [Online Quote Validation Widget](#)
- [Quote Review Widget](#)
- [Quote Reminder Email Information Widget](#)
- [Expired Quote Usage Request Email Information Widget](#)
- [Quote Order Switch Button Widget](#)
- [Cart Cancel Quote Button Widget](#)
- [Quote Submitted Message Widget](#)
- [Cart Quote Button Widget](#)