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

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.

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

🏠 Home > Order Complete

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

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.
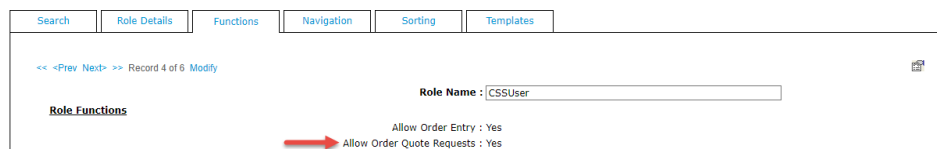

Configure Standard Quote mode

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**.

Search	Role Details	Functions	Navigation	Sorting	Templates

<< <Prev Next> >> Record 4 of 6 Modify

Role Name : CSSUser

Role Functions

Allow Order Entry : Yes

Allow Order Quote Requests : Yes

5. *Click* **OK** *to save.*
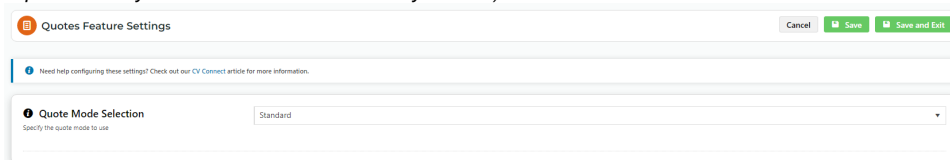
2. Set Order Quoting Mode to Standard

> ⓘ Quote requests in the standard quote mode will **not** automatically include freight charges. If this is required, another quote mote 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.*

Feature Management   🔍 quote

	Feature	Available in CMS	Options
Search Results			
Content	Quotes Configure options related to Quotes.	⬤	⚙ Configure
Payment & Checkout			

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.)*

Quotes Feature Settings   Cancel   💾 Save   💾 Save and Exit

ⓘ Need help configuring these settings? Check out our CV Connect article for more information.

ⓘ **Quote Mode Selection**   Standard   ▾
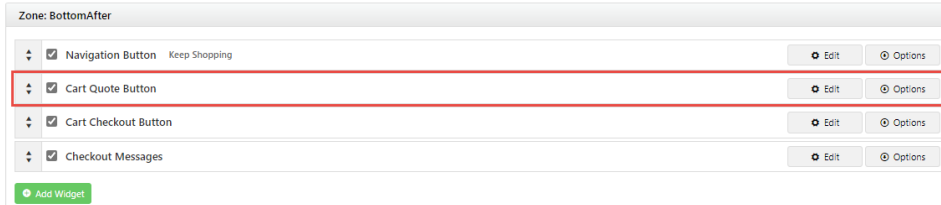Specify the quote mode to use

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.)

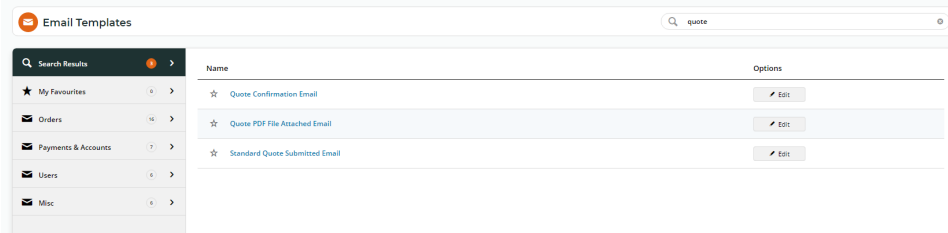1. *In the CMS, go to* **Content Pages & Templates Checkout Cart**.

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