Online Quotes mode

Is this feature disabled?

Contact To Enable *This feature needs to be implemented and enabled for your site by Commerce Vision. For versions 4.37+ only.*

On this page:

- Configure Online Quotes
  - 2. Configure Settings
  - 3. Edit Expired Quote Usage Request Email template (optional)
  - 4. Edit Quote Cancelled Reasons
  - 5. Set Scheduled Task Options
  - 6. Set Email Quote Options
  - 7. Set Default Role and Customer Account for Online Quotes (optional)
  - 8. Edit Online Quote Email Templates (optional)
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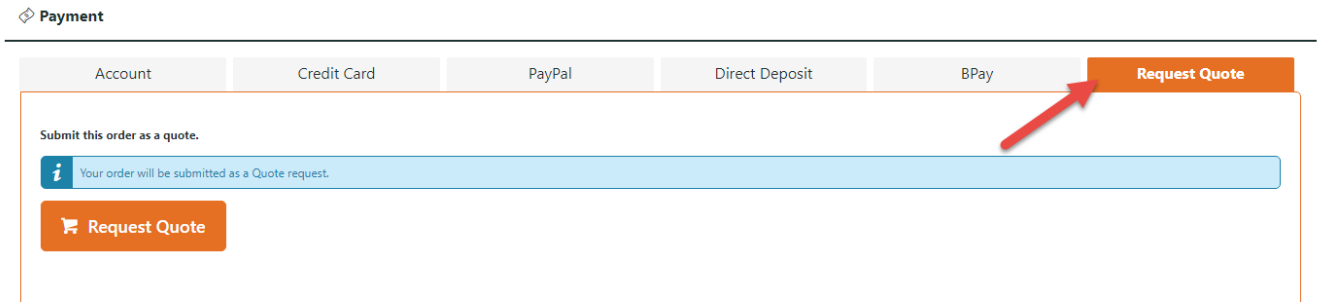
The Online Quotes mode is maintained and managed entirely on your website. So unlike the Standard mode, it does not rely on your ERP's quoting system. Settings are configured in the CMS. Currently, online quotes cannot be adjusted.

Online Quote mode in integrated with the Order Approvals feature. If budget limits have been set up on a customer account or for a customer user, any quote over the order limit will trigger the approval process.

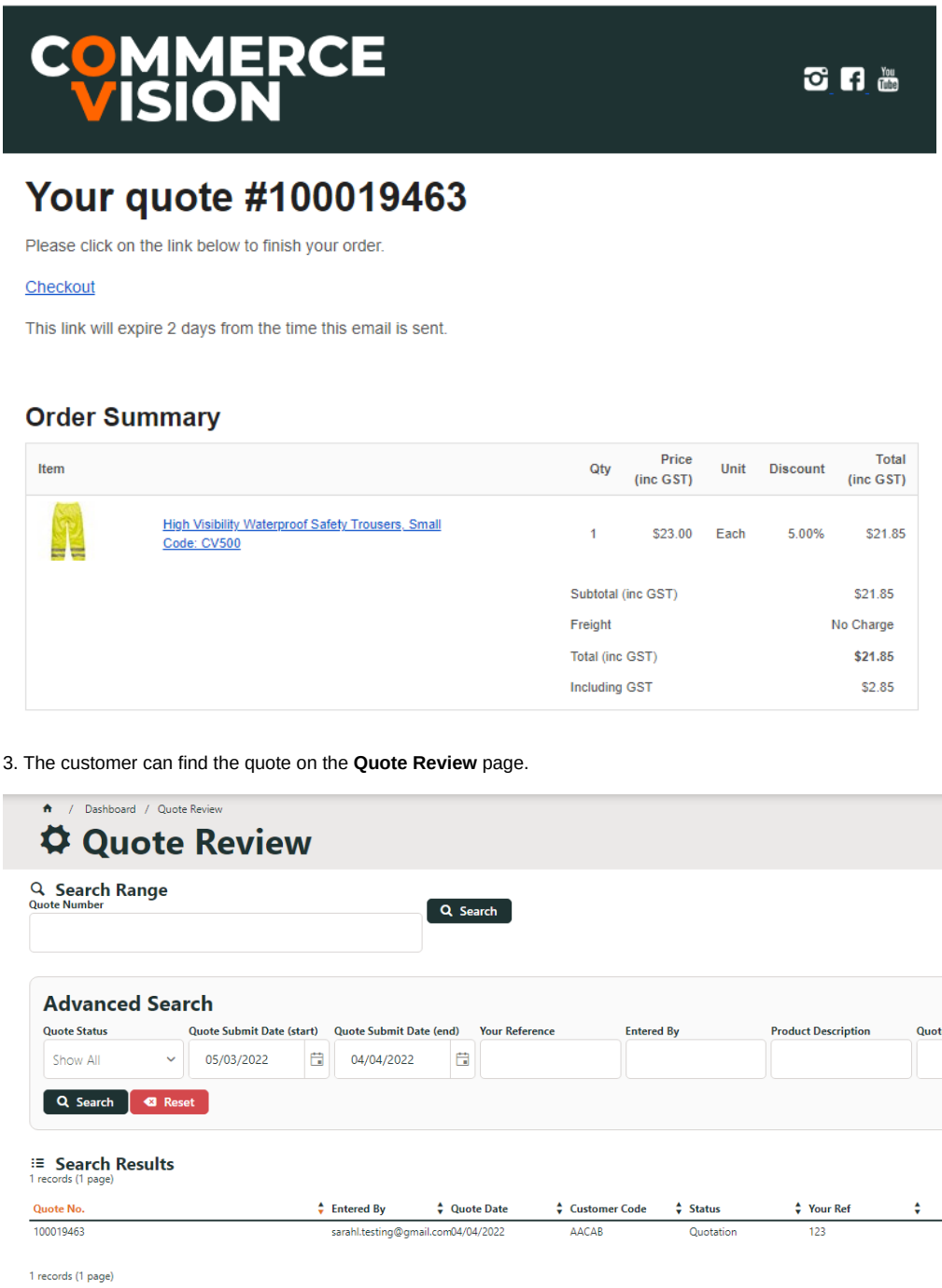
As with all modes, Online Quotes is Role-based. Quoting has to be enabled for each Role on the Roles maintenance page.

Customer Experience

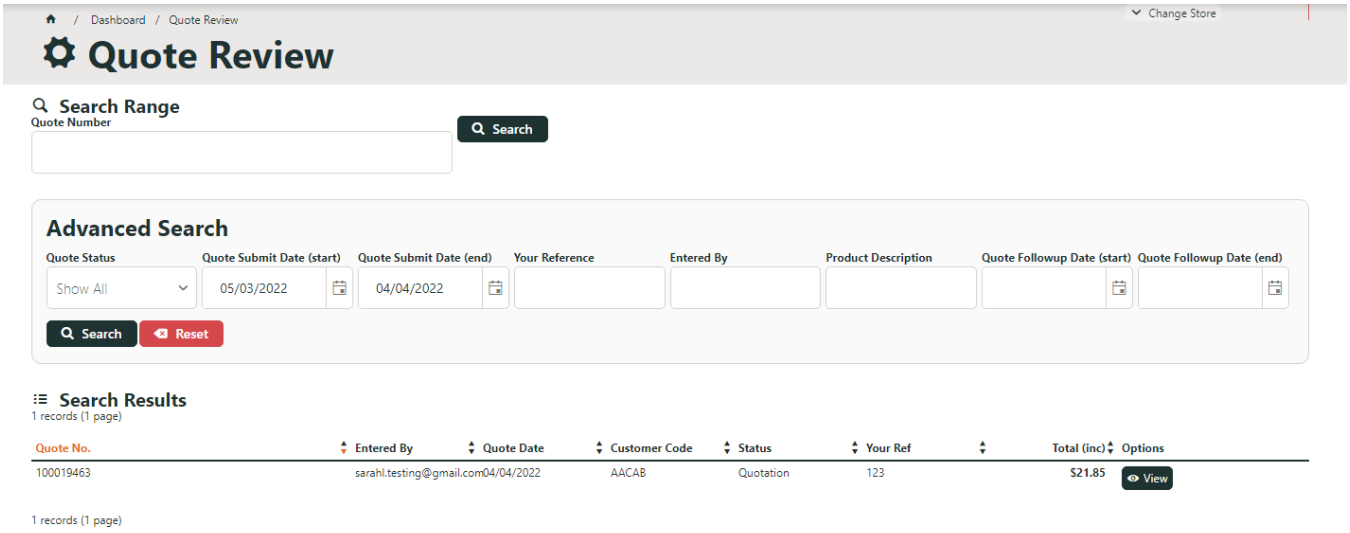
1. A customer user adds products to cart. In the last step of the checkout process, in the Payments panel, they click the **Request Quote** tab, then the **Request Quote** button. **NOTE -** Request Quote cannot be accessed on the cart page.



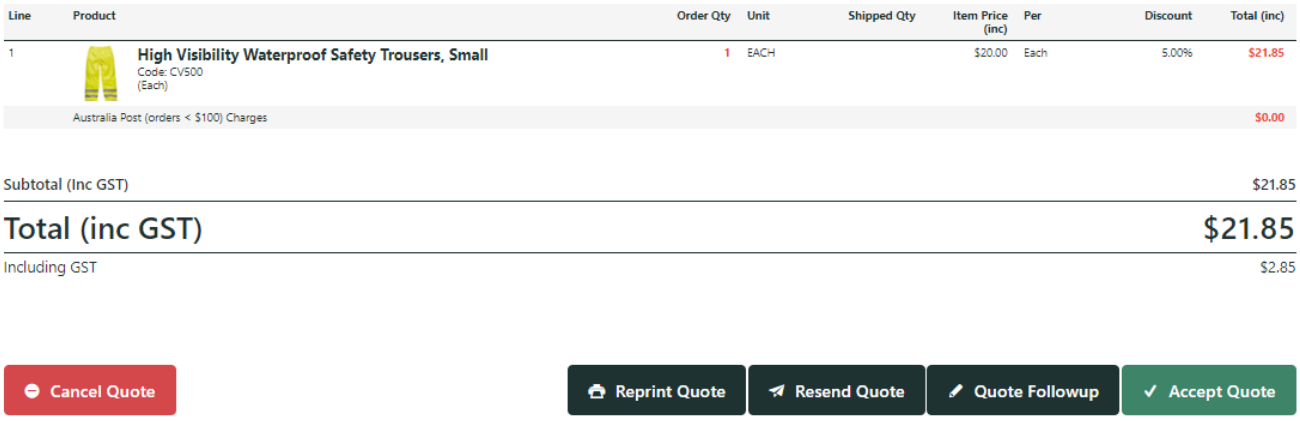
2. The customer receives a quote confirmation email. If approvals is triggered, the approver is emailed.



3. The customer can find the quote on the **Quote Review** page.



4, The customer clicks **View** for the quote. Action buttons to convert the quote to an order, as well as to reprint, resent, cancel, and add comment are available. See: Quote Review



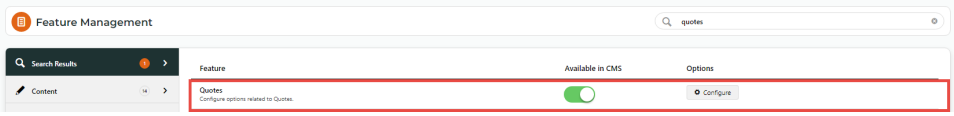
Configure Online Quotes

This guide assumes Commerce Vision has enabled the Standard mode for your website.

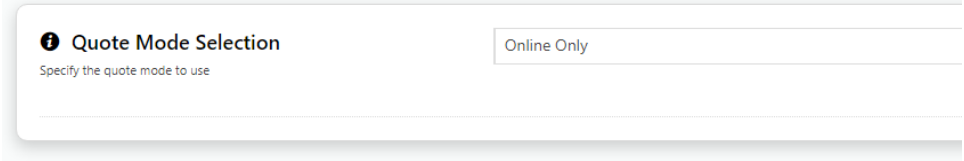
1. Enable Online Only Quote mode

This will have been set up for your site during implementation.

1. In the CMS, go to **Settings Settings Feature Management Payment & Checkout**. **Quotes**.



2. Toggle ON **Quotes**, then click **Configure**.
3. Ensure **Quote Mode Selection** is set to '**Online Only**'.



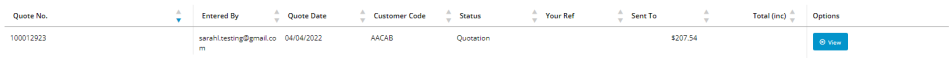
4. If you had to change Quote Mode to "Online Only', click **Save**.

2. Configure Settings

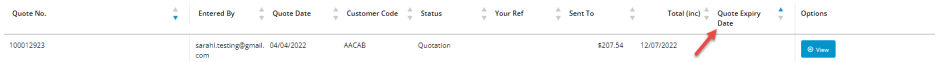
Use Configuration Settings to add custom search quote fields and edit the 'quote expiring' email task and labels.

1. **Quote Search Custom Field List**: select one or more custom fields to display as a column in the Quote Review page. (**NOTE -** Required custom fields may need to be added by Commerce Vision.)

No added custom field



With 'Quote Expiry Date' field added



2. **Quote Request Submitted Message**: message sent to user after quote has been submitted. Default: Your quote request has been submitted. Thank you.

Quote Expiring settings

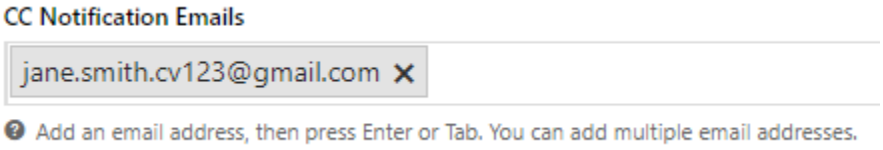
3. **Number of Days Before Quote Expires**: how many days before quote expires to send alert email. Default: 2

   Expiry Date Override must be custom-implemented. Use Case: A user creating a quote has included products that are currently discounted because of a promotion. A custom promo expiry field against products has been implemented for Product Maintenance. This retrieves relevant promo end dates from the ERP. The earliest promotion end date will be used as the quote expiry date instead of the default number of days.

4. **Enable Quote Expiry Date Override Field**: Toggle ON to allow override of expiry date. Default: OFF

5. **Quote Expiry Date Override Field**: If step 4 is on, select option.

6. **CC Notification Emails**: one or more internal contacts to cc when an expiring soon email is triggered. Type in email address, then press Enter key.

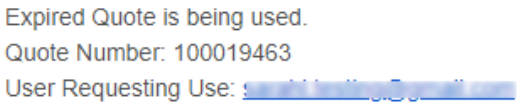


7. **BCC Notification Emails:** one or more internal contacts to bcc when an expiring soon email is triggered. Type in email address, then press E nter key.

8. Click **Save**.

3. Edit Expired Quote Usage Request Email template (optional)

When a user requests the use of an expired quote on the Quote Review page, an email is sent to the notification email address entered.



The template is accessed via **Content** menu **Emails** **Expired Quote Usage Request Email Template**

CMS Administrators can go directly to the Expired Quote Usage Request Email template via Quotes settings. Click the **Expired Quote Usage Request Email** button. See: Expired Quote Usage Email Information Widget.

4. Edit Quote Cancelled Reasons

The user can cancel the quote on the Quote Review page. Add a list of cancel reasons they can select from.

1. In the **Quotes Features Settings** page, ensure **Quote Mode Selection** is set to '**Online Only**'.
2. In **Configuration Settings**, click Edit Quote Cancelled Reasons
3. Click **Add New Quote Cancelled Reason**.
4. **Is Active:** enable this reason on your site
5. **Code:** identifier for the reason (not displayed to user)
6. **Description:** label user sees in the dropdown list.
7. Click **Save**.

5. Set Scheduled Task Options

The scheduled task checks for any expiring quotes within the days set in '**Number of Days Before Quote Expires'** and sends an email to the user and any cc'ed/bb'ed users.

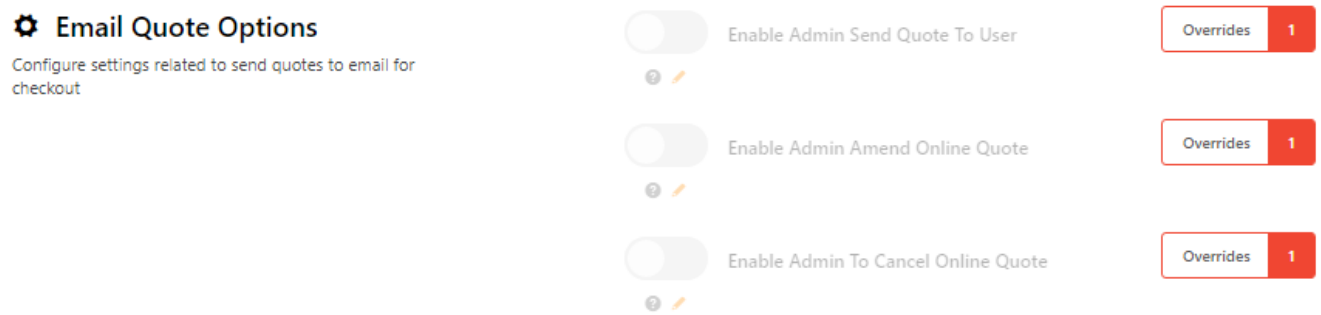
1. **Number of days before quote expiring to send email:** Default: 14
2. **Date to start running scheduled task**: enter date and time
3. To go directly to the Quote Reminder email template, click **Quote Reminder Email** button.

6. Set Email Quote Options

Admin quote functions must be set by Role to prevent global access. Use the Overrides system to give Quote Admin rights to particular Roles. Example: Cancelling an online quote might be restricted to Purchasing Officers. Only that Role can view and use the Cancel Quote button.

Set which Roles can:

- send a quote
- edit a quote
- cancel a quote



7. Set Default Role and Customer Account for Online Quotes (optional)

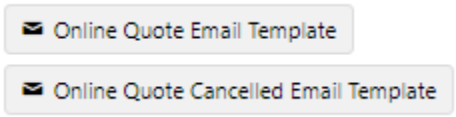
1. In **Default Role For Online Quote For New User**, enter a Role.
2. In **Default Customer Code For Online Quote For New User**, enter a customer code.

8. Edit Online Quote Email Templates (optional)

The quote email template and cancel quote email templates can be edited. Both templates contain the order details. See: Email Order Summary Widget. The Online Quote Email includes a link for the user to accept the quote and convert it to an order.

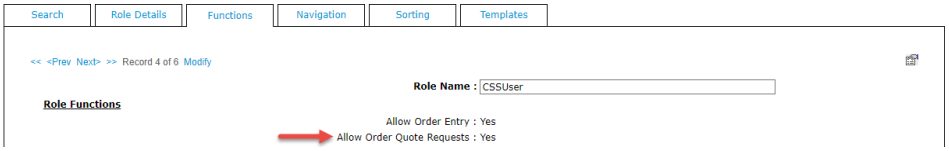
The templates are accessed on the **Content** menu **Emails Online Quote Email Template / Online Quote Cancelled Email Template**.

CMS Administrators can access them directly from the **Quotes Features Settings** page. Click:



9. Set Online Quote access for a Role

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



5. Click **OK** to save.

Additional Information

Minimum Version Requirements	4.37
Prerequisites	--
Self Configurable	No
Business Function	Ordering
BPD Only?	Yes
B2B/B2C/Both	B2B
Third Party Costs	n/a

Related help

- Freight Recalculation from Quote Review
- Quotes
- 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