

Quote Requests - Classic sites

Customer Self Service features a Quote function, whereby Customers can submit quote requests via their shopping cart. These are then integrated to PRONTO and can be used as lead-generation tools.

To enable online quoting, there are three main tasks (outlined step-by-step below):

1. Configure the flag at the Role level - this turns the Quoting functionality On/Off.
2. Configure the quote conclusion Resource - this customises the message Customers see when submitting a quote request.
3. Configure the email confirmation template - this customises the email Customers receive after the quote request integrates to PRONTO.



If your website is running on our BPD framework, see our [Standard Quotes mode](#) article for an easy How To.

Step-by-step guide

To configure the Role-based flag:

1. Login as an Administrator.
2. Navigate to '**Accounts**' or '**Customers**' --> '**Role Management**' (**zRoles.aspx**).
3. Select the Role to be updated using the radio buttons.
4. Click the '**Functions**' tab.
5. Scroll to the setting labelled '**Allow Order Quote Requests**'.
6. Tick the radio button for '**Yes**'.
7. Click '**OK**' to save.

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Search | Role Details | **Functions** | Navigation | Sorting | Templates

<< <Prev Next> >> Record 2 of 6 Modify Cancel OK

Role Name : B2B Full Access

Role Functions

Allow Order Entry : ☐ No ☒ Yes

Allow Order Quote Requests : ☒ No ☒ Yes

Enable Address Validation for B2C Quote : ☐

Hide Checkout Button in Order Grid : ☐

Hide Pricing in Order Grid : ☐

Enable Orders to be Placed on Hold : ☐ No ☒ Yes

Enable Order Entry by Stock Code : ☒ No ☐ Yes


Force Pack Quantity on Order Entry : ☐ No ☒ Yes

Enable Product Availability on Order Entry : ☒ No ☐ Yes

Enable Order Line Notes : ☐ No ☒ Yes

To configure the Quote Conclusion Resource:

1. Login as an Administrator.
2. Navigate to '**Content**' --> '**Resource Manager**' (**ZResourceMaintenance.aspx**).
3. Search for '**Quote Conclusion Details**'.
4. Ensure the resulting record selected is Resource Code '**rcQuoteConclusionTitle**'.
5. Click '**Modify**'.
6. Enter plain text or HTML into the '**Resource value**' field. This will be the content displayed after customers submit a quote request.
7. Click '**OK**' to save.


Resource Maintenance			
Search For : <input type="text" value="rcQuoteConclusionTitle"/> <input checked="" type="radio"/> Contains <input type="radio"/> Starts With <input type="button" value="Search"/>			
Resource Code	Language Code	Resource Value	Description
Quote Conclusion Details			
<input checked="" type="radio"/> rcQuoteConclusionTitle	en-au	Thank you for your quote request. Your Account Manager will review the quote and contact you shortly.	Used on OrderComplete as the conclusion Title when processi
 Modify : New : Delete			
1 records. (1 page)			
Resource Code : rcQuoteConclusionTitle			
Language Code : en-au			
Resource Value : <div><div><div class="min-height"> <h2>Quote Conclusion Details</h2> <p> Thank you for your quote request.
 Your Account Manager will review the quote Used on OrderComplete as the conclusion Title when processing a quote</div></div>			
Description :			






































Quote Conclusion Details

Thank you for your quote request.

Your Account Manager will review the quote and contact you shortly.

To configure the Quote Confirmation Email Template:

1. Login as an Administrator.
2. Navigate to '**Settings**' --> '**Assign Default Templates**' (**zAllocate.aspx**).
3. Scroll to '**Quote Confirmation Email Template**' and set the value:
 - a. Leave blank to use the default system template, or
 - b. Assign a Custom Template by clicking into the text field or using the  icon.
4. Click the '**Update**' button at the bottom of the page to save changes.

Dealer Locator No Results Template :	<input type="text"/>	  
Quote Header Template :	<input type="text"/>	  
Quote Loaded Success Template :	<input type="text"/>	  
Quote Loaded Failure Template :	<input type="text"/>	  
Quote Confirmation Email Template :	<input type="text" value="Quote Confirmation Template"/>	   
Gift Card Payment Instructions Template :	<input type="text"/>	  
Gift Card Entry Header Template :	<input type="text"/>	  
Gift Card EMerchants Site Link Template :	<input type="text"/>	  
Gift Card Tranfer Order Description Fields :	<input type="text"/>	  
Order Budget Template :	<input type="text"/>	  
Budget Remaining Email Template :	<input type="text"/>	  
Customer Budget Expiry Warning Email Template :	<input type="text"/>	  

Example system default email template

Example customised email templat

Following are the details of the Quote you placed.

Sales Quote Number	139762
Customer Details	139762, 139762, 139762, 139762, 139762, 139762
Customer Reference	
Entered by	B2B Test User
Email Address	testuser@b2b.com

QUOTE DETAILS

StockCode	Quote Qty.	Item Description
70000000	1	WOVEN STRAP DISPENSER 0
70000000	1	SAFETY BEARD COVER WHT

DELIVERY DETAILS

Address :

[Redacted]
[Redacted]
[www.scribd.com](#)
[Redacted]
[Redacted]
[Redacted]

Instructions :

[Redacted]
[Redacted]




POWERED by *Customer Self Service*, a [Commerce Vision Pty. Ltd.](#) product.



Quote Confirmation

Hi UserName,
Thank you for your quote request.
quote and be in contact with you.

Your Quote Details

Item
 <div> <p>Product Title</p> <p>Product Description /</p> </div>
 <div> <p>Product Title</p> <p>Product Description /</p> </div>
 <div> <p>Product Title</p> <p>Product Description /</p> </div>

Billing Address:

Commerce Vision
30 Lisburn Street
East Brisbane, QLD, 4169

Delivery Instructions:

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Notes:

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Quote requests utilising standard system functionality (outlined above) will **not** include shipping charges or delivery address information. If this data is required in quote calculations, please contact Commerce Vision for further information.