

# Cart Quote

The complete Magento Quotation manager

## User Manual



Version	5.0.4
Support questions:	<a href="mailto:support@cart2quote.com">support@cart2quote.com</a>
Sales questions:	<a href="mailto:sales@cart2quote.com">sales@cart2quote.com</a>
Website:	<a href="http://www.cart2quote.com">www.cart2quote.com</a>
Release Date:	04-05-15

# Table of Contents

---

This manual is divided into two sections. The first section explains how your website visitor will experience Magento Quotations in the front-end. In the next section, it is shown how a shop admin is able to process quotation requests on a daily basis in the back-end.

Table of Contents	2
Introduction Cart2Quote   Magento Quotation Extension	3
1) Front-end from a customer's perspective	4
Add to Quote button	4
Shopping Cart and Quotation Request page	5
Shopping Cart page	5
Quotation Request Page	6
Estimate Shipping and Tax Form	6
Submit form	7
Transactional emails	7
PDF attached to email with price proposal	9
Magento customer dashboard	10
2) Managing Quotations in the Back-end: Create, Edit & Convert quotes	11
Quotation Grid	11
Free version - until here and no further	11
Quotation detail page	12
Quote information	12
Quotation Management	13
Account information	13
Product information	14
Edit a Quotation	14
Create a new quotation	15
File upload	15
Message History	15
Discount	16
Quote Totals	16
Need more help?	18



# Introduction Cart2Quote | Magento Quotation Extension

---

Cart2Quote is the most complete Magento module that enables customers and shop owners to create a Request for Quote (RFQ) on Magento websites. With Cart2Quote you can effectively track customer quotations, edit quotation requests, create proposals and convert quotations to orders. This all via the front-end and back-end of Magento.

This manual assumes you have already successfully installed Cart2Quote on your server. If you need instructions with installing, please read the [Installation Manual](#).



Cart2Quote is a complex module with many features. To utilize all features, configuring and setting it up will take some time. Please make sure you read this manual completely and follow the necessary steps carefully.

---

With Cart2Quote, you are in business! We wish you many, many leads generated by Cart2Quote. Cart2Quote gives you the best chance of converting these leads into orders.

- The Cart2Quote team



# 1) Front-end from a customer's perspective

## [Add to Quote button](#)

Cart2Quote gives the shop owner complete control in enabling quotations for products. The "Add to Quote button" can be enabled for each product individually, even within the same product category. Furthermore, Cart2Quote lets shop owners decide where they want to show the "Add to Quote button". When Quotations are enabled, it is always shown in the product detail page, but it can also be shown in the grid/list views. For an explanation of all back-end configuration options for Cart2Quote, see the [Installation Manual](#).

The screenshot displays an e-commerce interface. At the top, a category header reads "ELECTRONICS". Below it, a navigation bar includes "SORT BY: Position", "VIEW AS:" with grid and list icons, and "7 Item(s) SHOW: 12". A grid of four product cards is shown:

- MADISON 8GB DIGITAL MEDIA PLAYER**: Price \$40.00, 5 stars, "ADD TO CART" button.
- COMPACT MP3 PLAYER**: Price \$35.00 (crossed out), \$31.50, 5 stars, "ADD TO QUOTE" button.
- MADISON EARBUDS**: Price \$35.00 (crossed out), \$31.50, 5 stars, "ADD TO QUOTE" button.
- MADISON OVEREAR HEADPHONES**: Price \$125.00, 4 stars, "ADD TO QUOTE" button.

Below the grid, a navigation bar shows "ISLAND" and a search bar. A detailed product view for "MADISON EARBUDS" is shown below, featuring a large image of the earbuds, a price of \$31.50 (with \$35.00 crossed out), an "IN STOCK" status, a quantity selector set to 1, and "ADD TO CART" and "ADD TO QUOTE" buttons. Social media icons for email, Facebook, and Twitter are also present. At the bottom, a tabbed interface shows "DESCRIPTION", "ADDITIONAL INFORMATION", and "REVIEWS". The description text reads: "Balanced audio. Enhanced bass. Includes cable clip, diaphragm guard, cleaning tool, travel pouch and airline adapter."



It is also possible to show the quotation button on the product detail page but hide it in the list/grid views. Please review the [Installation Manual](#) for instructions.



## [Shopping Cart and Quotation Request page](#)

With Cart2Quote, a Magento webshop features two important pages for finalizing orders, which are:

- 1) Shopping cart page
- 2) Quotation Request page

Customers can easily switch between the two lists and can order or request a quote at the same time.

## [Shopping Cart page](#)

The shopping cart page can be shaped in any way a shop owner likes using the tools Magento offers.

Cart2Quote adds a "Copy to Quotation button" to the Shopping Cart page. With this button, all products that are available for quotations will be copied from the shopping cart to the Quotation Request Page.

The screenshot shows a Magento shopping cart interface. At the top, there are two tabs: "SHOPPING CART" (active) and "REQUEST FOR QUOTE". A "PROCEED TO CHECKOUT" button is located in the top right corner. Below the tabs, a green notification bar states "Madison Earbuds was added to your shopping cart." The main cart area contains a table with the following data:

PRODUCT	PRICE	QTY	SUBTOTAL
 <b>MADISON EARBUDS</b> <i>SKU: hde010</i>	\$31.50	2	\$63.00

Below the table, there are links: "EMPTY CART", "UPDATE SHOPPING CART", "-OR-", "CONTINUE SHOPPING", and "COPY TO QUOTATION". To the right of the table, there is a "DISCOUNT CODES" section with an input field and an "APPLY" button. Below that is the "ESTIMATE SHIPPING AND TAX" section with fields for "COUNTRY", "STATE/PROVINCE", "CITY", and "ZIP", and an "ESTIMATE" button. At the bottom right, a summary box shows:

SUBTOTAL	\$63.00
TAX	\$5.20
<b>GRAND TOTAL</b>	<b>\$68.20</b>

A "PROCEED TO CHECKOUT" button is located at the bottom right of the summary box.



Cart2Quote enables the customer to move items from the shopping cart to the quotation page and vice versa. Cart items will be copied to the quote, not moved. Why? Simply because ordering is the main purpose of the shopping cart. Items will therefore never be removed from the shopping cart.



### Quotation Request Page

A basic Quotation Request page consists of the products, prices, quantities, information of the buyer, text boxes for specific and general remarks and a submit button. The page is very easy to understand for customers and they will be able to request quotes for multiple quantities of multiple products. After requesting a quote, shop admins can submit a proposal via the back-end to the customer. The customer can checkout as normal but with the custom price.

PRODUCT	REMARKS	PRICE	QTY
 MADISON EARBUDS SKU: hde010 <a href="#">Edit</a>	Be advised to enter your comments, desired quantities and details only when you're done shopping. This information will be lost when leaving this screen without submitting your Request. If you have an account with us, please login first.	\$31.50	2 <a href="#">Add Tier</a>

### Estimate Shipping and Tax Form

Cart2Quote offers a form to estimate shipping and tax. Entering the shipping details by selecting “Request a shipping quote” is optional but can also be set to mandatory using the Cart2Quote configuration.

**ESTIMATE SHIPPING AND TAX**

COUNTRY \*      STATE/PROVINCE

CITY      ZIP \*

[ESTIMATE](#)



### [Submit form](#)

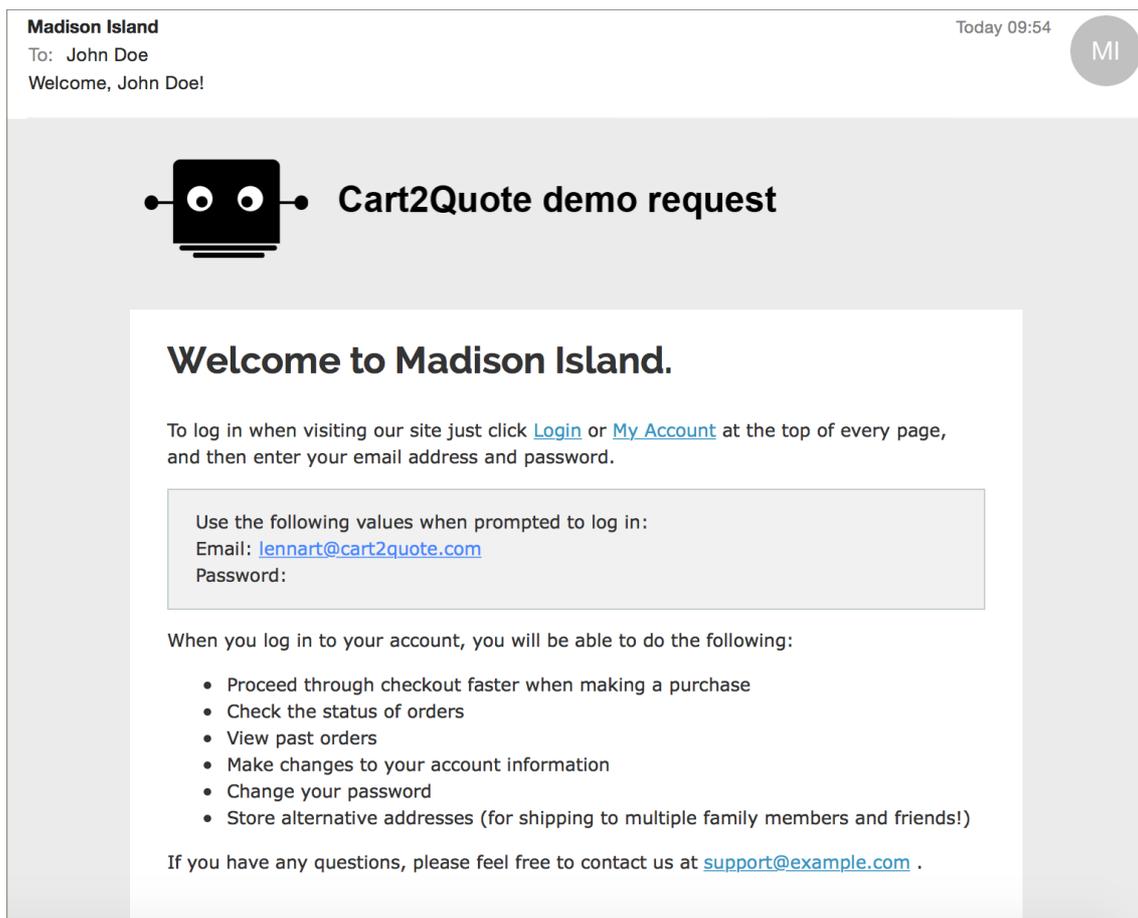
Cart2Quote also offers a minimalistic submit form. This will help the conversion of visitors to leads.

**REMARKS**

Do you have a general remark with this Quote Request?

### [Transactional emails](#)

Cart2Quote allows the shop owner to create different templates for e-mails to inform the customer of his activities and the actions that are to be taken by the shop admins. Optionally, a PDF can be attached to the e-mail with the price proposal.



*Welcome e-mail*





## Cart2Quote demo request

Dear John Doe

**THANK YOU AGAIN FOR YOUR QUOTE REQUEST FROM MADISON ISLAND.**

You will find our proposal in the attached PDF.  
Our Terms and Conditions are also attached as PDF.  
To view all details, edit or accept this proposal visit [My Quotes](#) in your customer dashboard.

Questions on your quotation?

Email: [support@example.com](mailto:support@example.com)

Your Quote Request# Q15.00560

Placed on May 26, 2015

### REMARKS WITH REQUEST

In this box, customers can put a general remark.

Item	Name	SKU	Tier/Qty	Price	Subtotal
	Madison Earbuds	hde010	5	\$33.50	<b>\$167.50</b>
			25	\$32.00	\$800.00
			100	\$30.00	\$3,000.00
Notes with Product:	In this box, customers can put a remark about the specific product.				
	Madison Overear Headphones	hde011	5	\$120.00	<b>\$600.00</b>
			20	\$112.00	\$2,240.00
Notes with Product:	In this box, customers can put a remark about the specific product.				
				Subtotal	\$767.50
				Shipping & Handling	<a href="#">Select in Checkout</a>
				Tax	\$63.32
				Grand Total	\$830.82

**PROCEED TO CHECKOUT**

[Visit customer dashboard for more options](#)

#### BILL TO:

John Doe  
Cart2Quote  
Random Street  
New York, 1234XY  
United States

#### SHIP TO:

John Doe  
Cart2Quote  
Random Street  
New York, 1234XY  
United States

Thank you, Cart2Quote Demo Store!

Proposal e-mail





SAP America, Inc.  
 3999 West Chester Pike  
 Newtown Square, PA 19073  
 USA

To: John Doe Cart2Quote Random Street New York, 1234XY United States	Quote Proposal      Q15.00560 Date of Proposal      May 26, 2015 Proposal valid until      Jun 23, 2015 ( 29 days )
--	---

Available Shipping Methods
<b>United Parcel Service</b> Ground - \$26.55 3_Day_Select - \$57.67 Next_Day_Air - \$126.92 <b>Free Shipping</b> Free - \$0.00 <b>Flat Rate</b> Fixed - \$50.00

Product image	Product name	SKU	QTY	Price	Subtotal
	<b>Madison Earbuds</b>	hde010	5	\$33.50	\$167.50
			25	\$32.00	\$800.00
			100	\$30.00	\$3,000.00

*Why not play the Amelie Soundtrack while parading through Parisian rues? Madison earbuds deliver crisp clear sound with minimal distortion.*

*In this box, customers can put a remark about the specific product.*

	<b>Madison Overear Headphones</b>	hde011	5	\$120.00	\$600.00
			20	\$112.00	\$2,240.00

*Escape the sleepless city buzz with robust sound and aggressive noise cancellation.*

*In this box, customers can put a remark about the specific product.*

In this box, customers can put a general remark.	<b>Subtotal</b>	\$767.50
	<b>Shipping &amp; Handling (Excl. Tax)</b>	\$0.00
	<b>Tax</b>	\$63.32
	<b>Grand Total</b>	<b>\$830.82</b>

We trust that you will find our quote satisfactory and look forward to working with you. Please contact us should you have any questions at all.



## Magento customer dashboard

The Magento Customer Dashboard is a very user-friendly interface. Cart2Quotes adds a "My Quotes" tab to the Customer Dashboard. In this tab, the customer has an overview of all his quote requests.

# MADISON ISLAND

ACCOUNT QUOTE CART

Search entire store here...

## MY ACCOUNT

- ACCOUNT DASHBOARD
- ACCOUNT INFORMATION
- ADDRESS BOOK
- MY ORDERS
- BILLING AGREEMENTS
- RECURRING PROFILES
- MY PRODUCT REVIEWS
- MY TAGS
- MY APPLICATIONS
- NEWSLETTER SUBSCRIPTIONS
- MY DOWNLOADABLE PRODUCTS
- MY QUOTES

## QUOTE REQUEST #Q15,00560

Resubmit Quote | Print Quote

About This Quote: **Quote Information**

QUOTE REQUEST DATE: MAY 26, 2015  
PROPOSAL VALID UNTIL: JUN 24, 2015

**SHIPPING ADDRESS:** John Doe, Cart2Quote  
Random Street  
New York, 1234XY  
United States

**SHIPPING METHOD:**  
Shipping & Handling price varies. Please select required quantity and checkout online to see applicable price.

**REMARK WITH PROPOSAL :** In this box, customers can put a general remark.

## COMPARE PRODUCTS

You have no items to compare.

## ITEMS REQUESTED

	NAME	COMMENT	ORIGINAL PRICE	QTY	PROPOSAL
	 <b>MADISON EARBUDS</b>	In this box, customers can put a remark about the specific product.	\$35.00	5 25 100	<input checked="" type="radio"/> \$33.50 <input type="radio"/> \$32.00 <input type="radio"/> \$30.00
	 <b>MADISON OVEREAR HEADPHONES</b>	In this box, customers can put a remark about the specific product.	\$125.00	5 20	<input checked="" type="radio"/> \$120.00 <input type="radio"/> \$112.00

Subtotal	\$767.50
Tax	\$63.32
<b>Grand Total</b>	<b>\$830.82</b>
Grand Total to be Charged	\$830.82

**Quote status:** Proposal sent

[EDIT REQUEST](#) [REJECT PROPOSAL](#) [CONFIRM AND CHECKOUT](#)

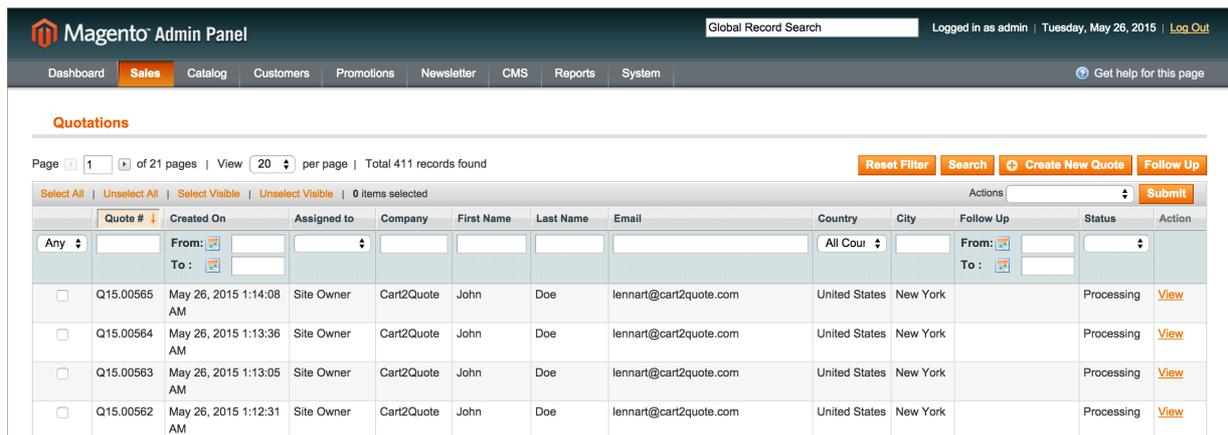
[Back to My Quotes](#)



## 2) Managing Quotations in the Back-end: Create, Edit & Convert quotes

### Quotation Grid

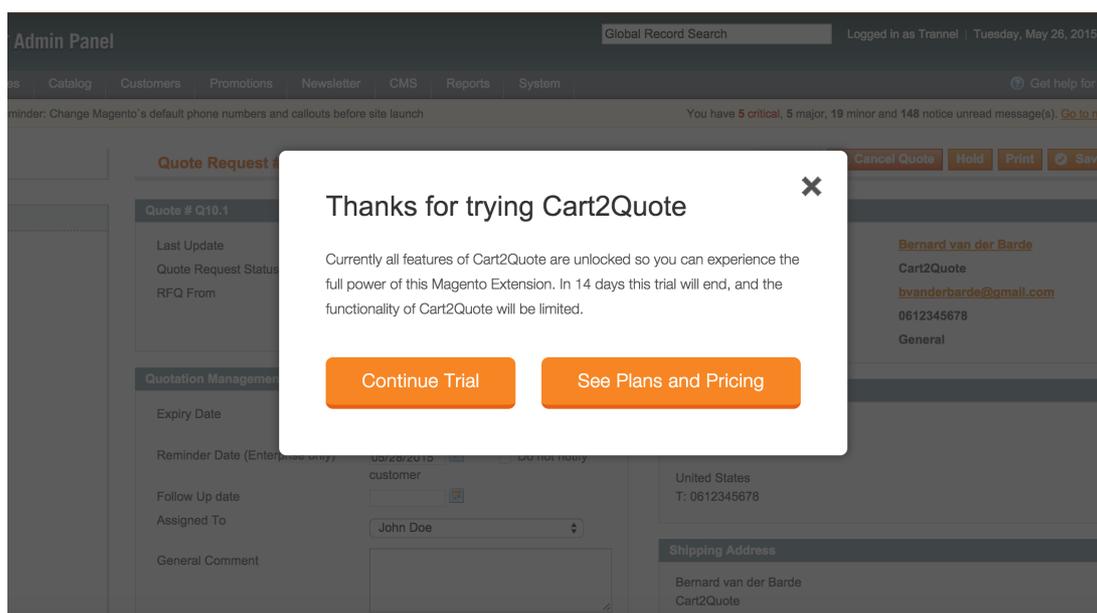
The shop admins are able to view all quotations in a grid that displays the most important information in the back-end. The shop admins will be able to change the status of the quote request from within this screen.



Quote #	Created On	Assigned to	Company	First Name	Last Name	Email	Country	City	Follow Up	Status	Action
Q15.00565	May 26, 2015 1:14:08 AM	Site Owner	Cart2Quote	John	Doe	lennart@cart2quote.com	United States	New York		Processing	<a href="#">View</a>
Q15.00564	May 26, 2015 1:13:36 AM	Site Owner	Cart2Quote	John	Doe	lennart@cart2quote.com	United States	New York		Processing	<a href="#">View</a>
Q15.00563	May 26, 2015 1:13:05 AM	Site Owner	Cart2Quote	John	Doe	lennart@cart2quote.com	United States	New York		Processing	<a href="#">View</a>
Q15.00562	May 26, 2015 1:12:31 AM	Site Owner	Cart2Quote	John	Doe	lennart@cart2quote.com	United States	New York		Processing	<a href="#">View</a>

### Free version - until here and no further

We hope you enjoy the free version of Cart2Quote. The functionality of the free version of Cart2Quote ends here. Do not forget to configure the email templates to see the quote request details. To unlock all functionality and process quotations in the most efficient and effective manner, consider upgrading to one of the paid versions. [Starting at €399](#). Or [unlock all functions on a local test server](#).



Admin Panel

Global Record Search

Logged in as Trannel | Tuesday, May 26, 2015

Quote Request #

Quote # Q10.1

Last Update

Quote Request Status

RFQ From

Quotation Management

Expiry Date

Reminder Date (Enter manually)

Follow Up date

Assigned To

General Comment

United States

T. 0612345678

Shipping Address

Bernard van der Barde

Cart2Quote

[bvanderbarde@gmail.com](mailto:bvanderbarde@gmail.com)

0612345678

General

Cancel Quote

Hold

Print

Save

**Thanks for trying Cart2Quote**

Currently all features of Cart2Quote are unlocked so you can experience the full power of this Magento Extension. In 14 days this trial will end, and the functionality of Cart2Quote will be limited.

[Continue Trial](#) [See Plans and Pricing](#)



[Quotation detail page](#)

The Quotation detail page contains many useful features. The complete Quotation detail page is shown below. In the next pages, all functionality will be further explained.

Quote Request # Q15.00560 | Quote Request Date May 26, 2015 1:10:44 AM | [LOCKED]

Back Cancel Quote Hold Edit Quote Print Save Quote

**Quote # Q15.00560**

Last Update: May 26, 2015 7:18:51 AM  
 Quote Request Status: Proposal sent  
 RFQ From: Demo  
 Madison Island  
 English

**Quotation Management**

Expiry Date: 06/25/2015  Do not notify customer  
 Reminder Date (Enterprise only): 05/27/2015  Do not notify customer  
 Follow Up date:   
 Assigned To: Site Owner  
 General Comment: In this box, customers can put a general remark.  
 Internal Comment:

\* Not visible for customers

**Account Information**

Customer Name: John Doe  
 Company: Cart2Quote  
 Email: lennart@cart2quote.com  
 Telephone:  
 Customer Group: General

**Billing Address**

John Doe  
 Cart2Quote  
 Random Street  
 New York, 1234XY  
 United States

**Shipping Address**

John Doe  
 Cart2Quote  
 Random Street  
 New York, 1234XY  
 United States

**Product Information**

Product Name	SKU	Comment with Product	Cost Price	Original Price	Qty	Price Proposal*	Margin (GP)	
Madison Earbuds	hde010	In this box, customers can put a remark about the specific product.	N/A	\$35.00	5	33.5	-4 %	
					25	32	-9 %	
					100	30	-17 %	
					Add			
Madison Overear Headphones	hde011	In this box, customers can put a remark about the specific product.	N/A	\$125.00	5	120	-4 %	
					20	112	-12 %	
					Add			
Total 2 product(s)			Subtotal:	\$0.00	\$800.00	10	\$767.50	100 %

\* - Enter custom price excluding tax

**File Upload**

Title:   
 Url:   
 File:  No file chosen

**Message History**

Subject:   
 Default Template Subject:   
 Message template: Default Templatestest

**B / I / U**

Hello John Doe,  
 This is the default template for CRM messages to send to the customer. Edit or update this CRM template and save it as a new template. This way you can add as many CRM templates as you want.  
 With the WYSIWYG editor it's even possible to use default markup in the CRM templates and messages!  
 Path: p > strong

Notify Customer by Email

May 26, 2015 7:18:57 AM | Customer Not Notified ✓

**Shipping Information - BETA FEATURE**

Use Store Settings:  [Get shipping methods and rates](#)  
 Price per Item:   
 Fixed Price Per Order:

**Discount**

Enter new Quote Subtotal:    
 Enter Percentage:   
 Coupon Code: -- Select Coupon --

**Quote Totals**

Subtotal Original (Excl. Tax)	\$800.00
Adjustment Quote (Excl. Tax)	\$-32.50
<b>Subtotal (Excl. Tax)</b>	<b>\$767.50</b>
<b>Grand Total (Excl. Tax)</b>	<b>\$767.50</b>
Tax	\$63.32
<b>Grand Total (Incl. Tax)</b>	<b>\$830.82</b>
Quote profit*	\$767.50

\* - Profit is based on entered cost prices

[Quote information](#)

This tab contains the quote information. It gives the time and date of the quotation request and the site from which is ordered. The status can be changed manually, because some orders will be closed per mail or phone, but the status will also change automatically when the ordering process progresses through Magento.

**Quote # Q15.00531**

Last Update: **May 20, 2015 6:17:25 AM**  
 Quote Request Status: Proposal accepted  
 RFQ From: Demo  
 Madison Island  
 English

- ✓ Starting
- Proposal created, not sent
- Processing
- Request expired
- Proposal sent
- Proposal sent - Proposal created by Salesrep
- Proposal sent - Contact Customer by Salesrep
- Proposal sent - Payment Pending
- Proposal expired
- Proposal on Hold
- Proposal on Hold - Quote is on hold
- Proposal on Hold - Waiting on Supplier
- Proposal sent
- Proposal cancelled
- Proposal cancelled - Out of stock
- Proposal rejected
- Proposal accepted
- Ordered



## Quotation Management

This tab gives advanced management possibilities for both internal use and notifying the customer. Here the expiry date and reminder date can be set and changed. It is optional to inform the customer about this. Also, comments can be placed. General comments, which can be seen by the customer in the "My Quotes" tab when signed in to the webshop, but also comments for internal use which are only visible in the back-end.

### Quotation Management

Expiry Date	<input type="text" value="06/19/2015"/>	<input type="checkbox"/> Do not notify customer
Reminder Date (Enterprise only)	<input type="text" value="05/21/2015"/>	<input type="checkbox"/> Do not notify customer
Follow Up date	<input type="text"/>	
Assigned To	<input type="text" value="Site Owner"/>	
General Comment	<input type="text"/>	
Internal Comment	<input type="text"/>	

▲ Not visible for customers

## Account information

In this part of the quotation detail page, all relevant customer information is shown.

### Account Information

Customer Name	<a href="#">John Doe</a>
Company	Cart2Quote
Email	<a href="mailto:lennart@cart2quote.com">lennart@cart2quote.com</a>
Telephone	
Customer Group	General

### Billing Address

John Doe  
Cart2Quote  
Random Street  
New York, 1234XY  
United States

### Shipping Address

John Doe  
Cart2Quote  
Random Street  
New York, 1234XY  
United States



## Product information

In the product information section prices and tiers can be proposed. Furthermore, comments for different products can be entered and the products can be edited.

Product Information								<a href="#">Edit products</a>
Product Name	SKU	Comment with Product	Cost Price	Original Price	Qty	Price Proposal*	Margin (GP)	
<b>Large Camera Bag</b> Branding: Plain	hde006	How much discount on different quantities?	N/A	\$120.00	12	<input type="radio"/> 115 <input type="radio"/> 110 <input type="radio"/> 100	-4 % -9 % -20 %	
<b>Madison Earbuds</b>	hde010	I'd like to purchase these more often in the future, give me your best price!	N/A	\$31.50	50	<input type="radio"/> 31.5	0 %	
Total 2 product(s)			Subtotal:	<b>\$0.00</b>	<b>\$3,015.00</b>	<b>62</b>	<b>\$2,955.00</b>	<b>100 %</b>

\* - Enter custom price excluding tax

[Update Total](#)

## Edit a Quotation

Editing a submitted quote is easy. After saving the proposal the "Edit Product" button will become active. Pressing it will bring you to the normal "Create Order screen" of Magento with the selected items, including their prices and quantities transferred to this screen. You can press the "Edit Product" button after you have selected the items and quantities that need to be edited. Editing a quote requires you to save the request and to select one quantity per product. Remarks and shipping prices will not be transferred, nor are the extra quantities per item that were originally requested. This is simply because Magento's Create New Order screen does not support this functionality.

Magento's Create New Order screen is extended with an extra button at the bottom of this screen. After you have changed the items in the list, you can press the "Update Quotation" button and all products including their quantities are transferred back to the quote detail page. Back in the quote view the shop admin is enable to create new tiers again.

Items Ordered								<a href="#">Add Products</a>
Product	Price	Qty	Subtotal	Discount	Row Subtotal	Action		
<b>Large Camera Bag</b> SKU: hde006	\$120.00	12	\$1,440.00	\$0.00	\$1,440.00	<input type="checkbox"/> Custom Price* 120.00	<input type="checkbox"/> Apply	
<b>Madison Earbuds</b> SKU: hde010	\$30.00	50	\$1,500.00	\$0.00	\$1,500.00	<input type="checkbox"/> Custom Price* 30.00	<input type="checkbox"/> Apply	
Total 2 product(s)			Subtotal:	<b>\$2,940.00</b>	<b>\$0.00</b>	<b>\$2,940.00</b>		

\* - Enter custom price excluding tax

[Update Items and Qty's](#)

Order Totals	
Subtotal	\$2,940.00
Tax	\$242.55
<b>Grand Total</b>	<b>\$3,182.55</b>
Append Comments	<input type="checkbox"/>
Email Order Confirmation	<input checked="" type="checkbox"/>
<a href="#">Update Quotation</a>	<a href="#">Submit Order</a>



## Create a new quotation

The workflow is exactly as above, but you will start with an empty form by pressing "Create New Quote" at the top right of the quotation grid page.

Quote Request #	Created On	Company	First Name	Last Name	Email	Country	City	Status	Action
Q10.5	Sep 3, 2011 6:25:09 AM	Ophirah	Remco	de Jong	remco@ophirah.nl	United States	My city	Proposal saved	<a href="#">View</a>

## File upload

With file upload, a file can be attached to your proposal e-mail.

**File Upload**

Title

Url

File

## Message History

In this section, messages can be sent to the customer via e-mail when "Notify Customer by E-mail" is enabled. When disabled, the message will only be visible in the back-end for internal users. This section differs from the general comment section, because the messages from the general comment section will only be seen by the customer in the "My Quotes" tab of the Magento webshop.

**Message History**

Subject  
Default Template Subject

Message template  
Default Templatest

**B I U**

**Hello Remco de Jong,**

This is the default template for CRM messages to send to the customer. Edit or update this CRM template and save it as a new template. This way you can add as many CRM templates as you want.

Path: p » strong

Notify Customer by Email

**May 20, 2015 7:14:35 AM | Default Template Subject**  
Sent to [bvanderbarde@gmail.com](mailto:bvanderbarde@gmail.com) ✓

Hello Remco de Jong,

This is the default template for CRM messages to send to the cust ...



### Discount

In this section, discounts can be applied to the quote. With "Enter new Quote Subtotal" a fixed price or a fixed percentage can be entered. A fixed price will set all products on the same discount percentage to approximately reach the entered fixed price. Entering a percentage will give a percentage discount over the quote. Coupon codes can also be applied here. Simply select one of your Magento promotions and hit "Apply".

Discount		
Enter new Quote Subtotal	<input type="text"/>	<input type="button" value="Recalculate"/>
	<a href="#">Enter Percentage</a>	
Coupon Code	<input type="text" value="-- Select Coupon --"/>	<input type="button" value="Apply"/>

### Quote Totals

In this section all amounts will be added together to make a Grand Total. The profit will also be given, based on the entered product cost prices. Taxes will be computed by the extensive tax configuration of Magento. This section gives two buttons, "Submit Proposal" and "Create Order".

Quote Totals	
Subtotal Original (Excl. Tax)	\$3,015.00
Adjustment Quote (Excl. Tax)	-\$75.00
<b>Subtotal (Excl. Tax)</b>	<b>\$2,940.00</b>
<b>Grand Total (Excl. Tax)</b>	<b>\$2,940.00</b>
Tax	\$242.55
<b>Grand Total (Incl. Tax)</b>	<b>\$3,182.55</b>
Quote profit*	\$2,940.00

\* - Profit is based on entered cost prices



With "Submit Proposal" a proposal will be sent via e-mail to the customer who requested the quotation. The customer then can view the proposal and proceed to checkout, make a counteroffer or reject the proposal. The customer can do this when logged in to his account on the webshop, but he is also able to proceed to checkout directly from the proposal e-mail.

ITEMS REQUESTED					
	NAME	COMMENT	ORIGINAL PRICE	QTY	PROPOSAL
	<b>LARGE CAMERA BAG</b> <i>Branding:</i> Plain	Could you give a discount on this product?		12	<input checked="" type="radio"/> \$120.00
				20	<input type="radio"/> \$115.00
				30	<input type="radio"/> \$110.00
	<b>MADISON EARBUDS</b>	I'd like to purchase these more often in the future, give me your best price!	\$31.50	50	<input checked="" type="radio"/> \$30.00
Subtotal					\$2,940.00
Tax					\$242.55
<b>Grand Total</b>					<b>\$3,182.55</b>
Grand Total to be Charged					\$3,182.55

Quote status: Proposal sent

With "Create Order" the selected items and quantities will be transferred to the create order section. An order will then be created like any other order in Magento.

Items Ordered							<input type="button" value="Add Products"/>
Product	Price	Qty	Subtotal	Discount	Row Subtotal	Action	
<b>Large Camera Bag</b> SKU: hde006 <input type="button" value="Configure"/>	\$120.00	12	\$1,440.00	\$0.00	\$1,440.00	<input type="text"/>	
	<input checked="" type="checkbox"/> Custom Price*			<input checked="" type="checkbox"/> Apply			
	120.00						
<b>Madison Earbuds</b> SKU: hde010 <input type="button" value="Configure"/>	\$30.00	50	\$1,500.00	\$0.00	\$1,500.00	<input type="text"/>	
	<input checked="" type="checkbox"/> Custom Price*			<input checked="" type="checkbox"/> Apply			
	30.00						
Total 2 product(s)			Subtotal: \$2,940.00	\$0.00	\$2,940.00		

\* - Enter custom price excluding tax

Order Totals	
Subtotal	\$2,940.00
Tax	\$242.55
<b>Grand Total</b>	<b>\$3,182.55</b>
Append Comments	<input type="checkbox"/>
Email Order Confirmation	<input checked="" type="checkbox"/>
<input type="button" value="Update Quotation"/> <input type="button" value="Submit Order"/>	



### [Need more help?](#)

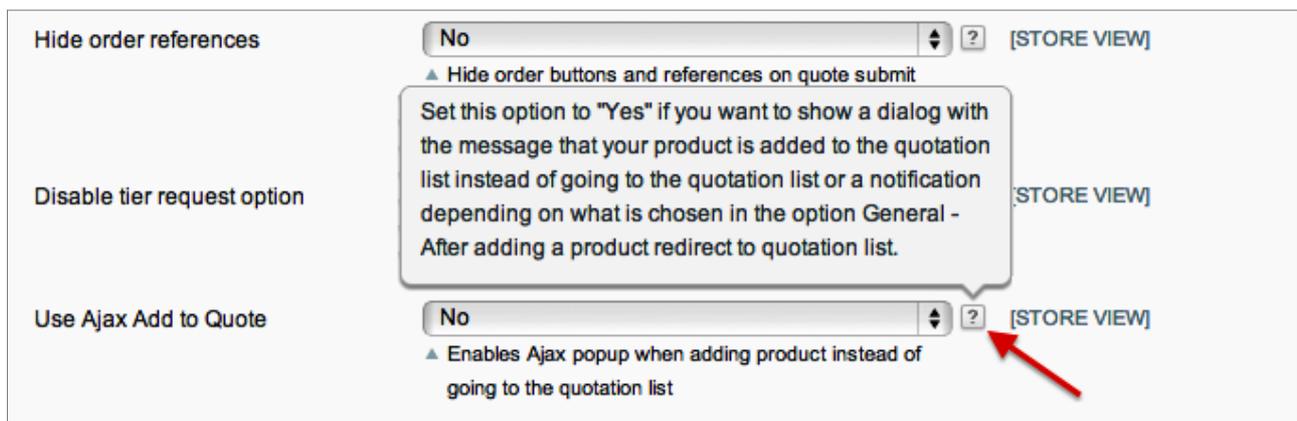
There are several sources of information about installing, configuring and using Cart2Quote.

#### 1) User forums and support articles

For general instructions, troubleshooting and best practices installing Magento extensions, [check out this article](#). You will find more specific development and configuration tips in our forums. Please feel free to share any tips and tricks in our user forum: [Cart2Quote development and configuration help forums](#).

#### 2) Manuals and help tools

This manual is accompanied by an [Installation Manual](#). This manual explains everything about the installation and configuration of Cart2Quote. We have also added a help tool for all the options in the Cart2Quote configuration settings. Just hover over the question marks and help texts will appear.



#### 3) API information

Cart2Quote Enterprise users can also use our API. For more information please read the [API manual of Cart2Quote](#).

#### 4) Purchase installation support

It is strongly recommended to let this Magento Quotation Module be installed by a technical implementer when you do not have the necessary knowledge of Magento modules installation. Cart2Quote has a core team of experienced professionals who are dedicated to offer Cart2Quote software installation, configuration and fine-tuning. Order [installation/development support](#) here.