



Quick start guide

Cart2Quote for Magento 2

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Introduction

Congratulations on your purchase of Cart2Quote for Magento 2. You are almost in business! This quick start guide helps you set up Cart2Quote. If you need support, look at our more [extensive manuals](#), [request e-mail support](#) or let us take care of installing Cart2Quote or integrating Cart2Quote to your theme by [purchasing development hours](#).

Installation

Decide how you want to install Cart2Quote, there are two options:

- ① Installation with the Magento 2 Component Manager
- ② Installation using the command line

Short instructions for both methods are given below.

Magento 2 Component Manager

If you purchased Cart2Quote in Magento's Marketplace, install the extension with the Component Manager. The installation process for Cart2Quote is the same as for any other extension in the Marketplace.

Command line

Please take a look at our extensive [installation manual](#) for instructions on installing Cart2Quote through the command line.

Getting started

The general settings can be found in the menu: Stores->Configuration->Cart2Quote->Quotation.

The screenshot shows the Magento 2 Configuration page for Cart2Quote. The left sidebar contains the navigation menu with 'CART2QUOTE' expanded to 'Quotation'. The main content area shows the 'General' settings for 'Frontend Quotation Visibility' and 'Global' settings for 'Default is Quotable Setting', 'Add Button on Detail Page', 'Add Button on Category Page', and 'Display Quotation Cart Sidebar'. Five green circles with numbers 1-5 are overlaid on the settings to indicate the steps to follow.

- ① Enable Cart2Quote for the frontend of your store
- ② Default is Quotable setting for new products
- ③ Enable/Disable the Quote button on the product detail page
- ④ Enable/Disable the Quote button on the category page

2 Create a Quote

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Create a Quote in the backend

- ① Go to Quotations
- ② Click "Create new Quote"
- ③ Select or create a customer
- ④ Add products to the order list
- ⑤ Click "Create Quote"

When this process goes well, Cart2Quote is correctly installed.



Requested	Customer Name	Customer Middlename	Customer Lastname	Grand Total	Status	Action
Jun 7, 2016, 1:27:09 PM	W		Graves	\$71.00	Ordered	View
Jun 8, 2016, 10:46:34 AM	Veronica	Costello		\$60.47	Open	View
Jun 8, 2016, 1:10:09 AM	Tung		Ha	\$176.80	Accepted	View

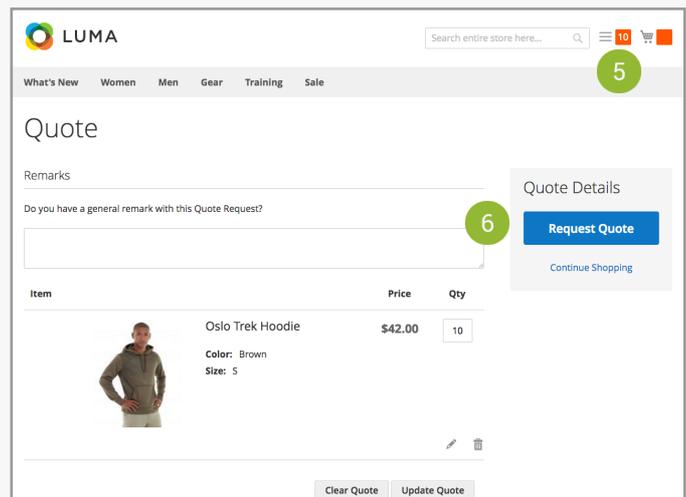
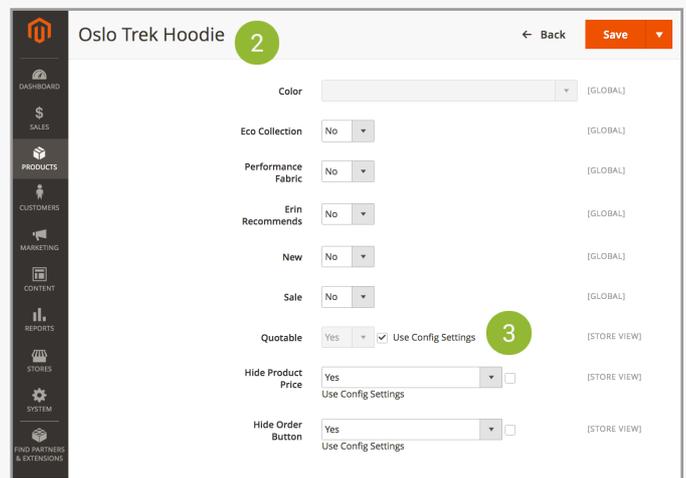
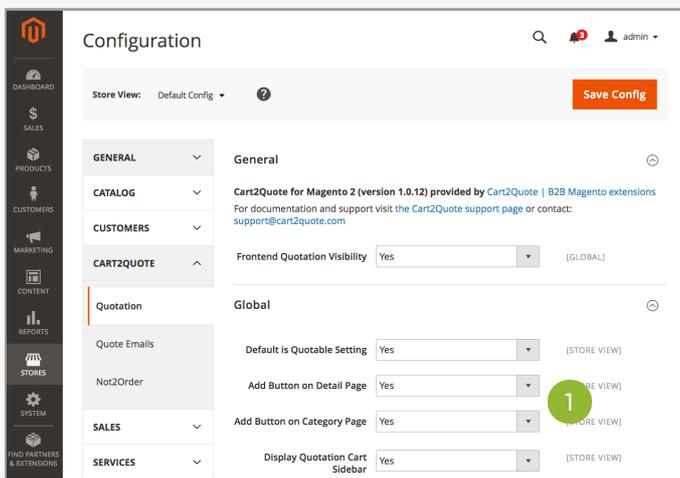
ID	Name	Email	Phone	ZIP/Post Code	Country	State/Province	Signed-up Point
2	Remco de Jong	remco@cart2quote.com			All Countries		Default Store View

Product	Price	Qty	Subtotal	Discount	Row Subtotal	Action
Enika Running Short-32-Red	\$45.00	1	\$45.00	\$0.00	\$45.00	Please select
SKU: WSH12-32-Red						
Total 1 product(s)	Subtotal:		\$45.00	\$0.00	\$45.00	

Quote Totals	
Original Subtotal	\$90.00
Quote Adjustment	\$20.00
Subtotal	\$70.00
Shipping & Handling (Flat Rate - Fixed)	\$10.00
Grand Total	\$80.00

Create a Quote in the front-end

- ① In your backend, enable 'Add Button on Detail Page' and 'Add Button on Category Page' for front-end functionality.
- ② Select a product.
- ③ Set 'Quotable' to "Yes".
- ④ In your front-end, find the product and click "Add to Quote".
- ⑤ View Quotation.



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Configure Cart2Quote

When everything works fine, you can configure Cart2Quote to your wishes and make changes to your theme if necessary.

Learn more

Take a look at our more extensive manuals for further explanation of the configuration processes:

→ [User Manual](#)

→ [Installation Manual](#)

