

Cart Quote

The complete Magento Quotation manager

Installation Manual



Version	5.0.4
Support questions:	support@cart2quote.com
Sales questions:	sales@cart2quote.com
Website:	www.cart2quote.com
Release Date:	04-05-15

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This manual is divided into four sections. The first section explains the installation of Cart2Quote on a Magento server. The second part explains the first configuration settings after installation to test the extension. The third section gives an elaboration of all back-end configuration settings of Cart2Quote. The last section gives a summary of all other sources for tips, help and troubleshooting.

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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's) 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 or back-end of Magento or via the API web services available in Cart2Quote Enterprise.

It is recommended you first install the module in a test Magento environment that is a copy of your live store. After you have verified the module works correctly in your test store, you can safely install the module in your live website.

For a complete elaboration of all Cart2Quote functionality, please refer to the [User Manual](#). The User Manual explains Cart2Quote's functionality from two perspectives: First from a customer perspective in the front-end and second from a shop admin perspective in the back-end.



It is recommended to let the module be installed by a technical implementer if you do not have the necessary knowledge of Magento modules' installations. The Cart2Quote module may require some changes to your existing template. [Purchase the installation service](#).



1) Installation Cart2Quote

1) [Backup your data](#)

Backup your store database and web directory. You can backup your database through the Magento admin facility under the system-tools-backups menu. Backing up your files can usually be done through the configuration panel of your hosting provider. A database backup is also recommended.

2) [Download and extract](#)

Download the extension from our website (from your client area in our store) and unzip the extension's contents on your computer and navigate inside the extracted folder.

3) [IONCube](#)

To protect our intellectual property we have encrypted our software. Therefore you need to have [ionCube](#) installed on your server. Don't know if you have ionCube? Ask your hosting company to find out. Require open source version? Buy or upgrade to our [Cart2Quote Enterprise edition](#) with open source option.

For more information about IonCube and Cart2Quote, take a look at the [support article on installing Cart2Quote IonCube files](#) and the [support article on installing IonCube on your server](#).

4) [Disable Compilation Mode](#)

This may not be an issue for many readers, but if you are using Magento's compilation mode on your store, it is important that you remove it. Without going into too many details, compilation mode takes many files spread out over the system and condensing them into a single file that can be run very quickly. If the files of Cart2Quote are not in the system when this single file is 'compiled', they will not be included. To check that this is disabled, go to System->Tools->Compilation. If the compiler status is 'Disabled', you are ready to go. If not, simply click the 'Disable' button on the right hand side of the screen.

[\(System > Tools > Compilation\)](#)



Checklist:

1. **Backup web directory** (*FTP*)
2. **Backup database** (*MYSQL*)
3. **Download and extract Cart2Quote extension from our website**
4. **Check your server for an installed ionCube**
5. **Check the ionCube version**
6. **Disable Compilation Mode**



5) Disable the cache

The Magento front end relies heavily on caching to provide a faster experience to customer. This is a wonderful tool, but can wreak havoc during the installation process. To ensure that the cache is not the cause of any problems, we should turn it off. This can be done from the admin console by navigating to the cache management page, selecting all caches, clicking 'disable' from the drop-down menu, and submitting the change.

([System > Cache Management](#))

The screenshot shows the 'Cache Storage Management' section of the Magento admin console. It features a table of cache types and their associated tags, with a 'Status' column for each. The 'Status' column contains red buttons labeled 'DISABLED'. A dropdown menu is open over the 'Flush Magento Cache' button, showing options: 'Enable', 'Disable', and 'Refresh'. A 'Submit' button is also visible. Below the table is the 'Additional Cache Management' section, which includes 'Flush Catalog Images Cache' and 'Flush JavaScript/CSS Cache' buttons. Green arrows and numbers 1 through 5 point to these specific elements: 1 points to the 'Disable' option in the dropdown, 2 points to the 'Flush Magento Cache' button, 3 points to the 'Cache Storage' button, 4 points to the 'Flush Catalog Images Cache' button, and 5 points to the 'Flush JavaScript/CSS Cache' button.

Cache Type	Description	Associated Tags	Status
<input checked="" type="checkbox"/> Configuration	System(config.xml, local.xml) and modules configuration files(config.xml).	CONFIG	DISABLED
<input checked="" type="checkbox"/> Layouts	Layout building instructions.	LAYOUT_GENERAL_CACHE_TAG	DISABLED
<input checked="" type="checkbox"/> Blocks HTML output	Page blocks HTML.	BLOCK_HTML	DISABLED
<input checked="" type="checkbox"/> Translations	Translation files.	TRANSLATE	DISABLED
<input checked="" type="checkbox"/> Collections Data	Collection data files.	COLLECTION_DATA	DISABLED
<input checked="" type="checkbox"/> EAV types and attributes	Entity types declaration cache.	EAV	DISABLED
<input checked="" type="checkbox"/> Web Services Configuration	Web Services definition files (api.xml).	CONFIG_API	DISABLED
<input checked="" type="checkbox"/> Web Services Configuration	Web Services definition files (api2.xml).	CONFIG_API2	DISABLED



Checklist:

1. Turn off cache for all cache types
2. Flush Magento Cache
3. Flush Cache Storage
4. Flush Catalog Images Cache
5. Flush JavaScript/CSS Cache



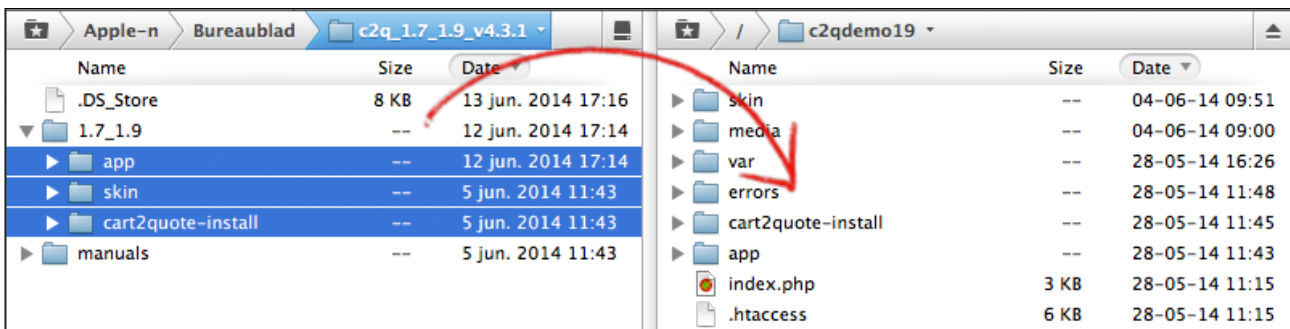
Uninstalling Cart2Quote? Do not test Cart2Quote on a production environment! Always make a backup of your store before the installation. Only install Cart2Quote on a production environment after thorough testing.



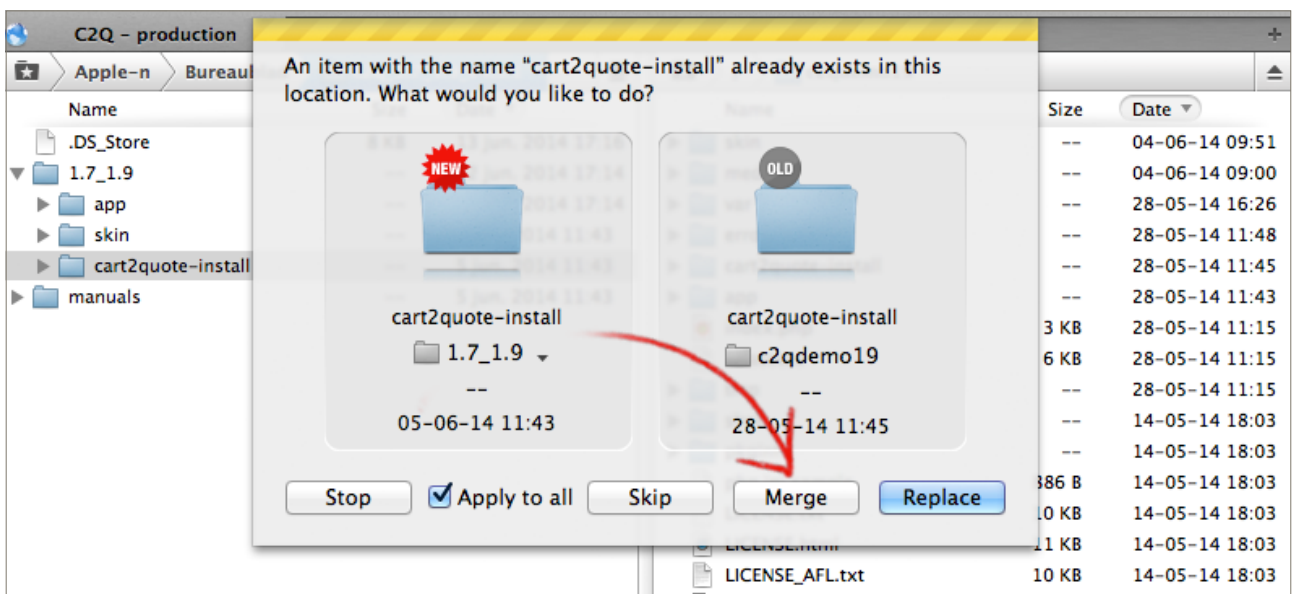
6) Upload Files

Using your FTP client upload the contents of the Cart2Quote package to your store root. The contents of the unzipped folder will look like this:

You can upload these folders to your Magento root. Your Magento root already contains the app and skin folders, by uploading you will add new files to the already existing folders. Adding the cart2quote-install folder is optional (see [Cart2Quote installation help tool](#)).



Always make sure you merge the folders and do not replace the existing folders, see below.



7) IonCube files

After uploading the Cart2Quote files, you need upload the **right** IonCube files. Go to the ioncube_files folder, select the right IonCube version and upload this to your Magento root directory.

For more information about IonCube and Cart2Quote, take a look at the [support article on installing Cart2Quote IonCube files](#) and the [support article on installing IonCube on your server](#).



Most of Cart2Quote's software is open source. Only 6 PHP controller files are encrypted the rest is open source. [Find out which files are encrypted](#) or purchase the [open source version](#).



8) Clear all cache & enable compilation mode

Go to System->Cache Management and click 'Flush Cache Storage'. This will ensure that everything cached by Magento is deleted and will to be regenerated. Once everything works as expected you can enable the cache and the compiler mode again.

[\(System > Cache Management\)](#)

9) Logout from Magento and login again

Make sure you logout from your admin panel and login again. (else you will maybe see a 404 page). Step 7 and 8 eliminate almost all potential problems.

10) Your license keys

If you have a paid versions of Cart2Quote you can utilize all functionalities including those of the backend. The license key will be provided by Cart2Quote within 24 hours after your order is completed. The license key will be send to the registered email address and can also be found in your account dashboard. Without a license you will not be able to create quotes in the Magento admin, create proposals, convert quote into orders, track your leads etc.

[\(System > Configuration > Cart2Quote > Quotations > General\)](#)



Experiencing installations difficulties? Go to our [User Forum](#) to see the solution for the most common problems. Or consider buying our [Installation service or Technical support tickets](#)

11) Free license

For IP number 127.0.0.1 (localhost) you can input the following serial key from the backend in

[\(System > Configuration > Cart2Quote > Quotations > General\)](#)

When using **Cart2Quote version 1.0 to version 4.4** use the following license key:

```
022c33d513a871a7958a0c5d94717f1d;23e8b229b02630d089d4a5a91871f37f;  
9675324bf3da955794913bef7ec5ee42;e2bbe9676cc132da9799d4ae8016a830;  
983f4a9e12d55d777707b03a50c80932;c14dd41e12d90125859c37113e2ffd48;  
e3ba127ae4006bd358b00e7a1b2d5704;a671533cc98bbe93a0e98f8b9225d75d;  
289cf58d7b1d862b61884f308e3f805b;ceca653b6ee89552496739559f621725;  
880c376d80f9afd2405c45420d2f08d9;799644a36d080e70d45f130806caeb6a;  
ebc4640259b7059b625bf11c62d5bb29;fe4a6f94b513f70f52cd11067acb147c;  
4a730dc1235678e7104616f3fb94e0a6;5150e42d0aac2fe10b8f8a08d01ce1dd;
```

When using **Cart2Quote version 5.0 and higher** use the following license key:

```
YzjIOWYwMGQ5NzEyODJhMTIxMjYzNjE5OTZkZTA2NDM7YmE3YWVhMDcxNjllZmQ4YTRiZDliZGM0Yml3NjRjMzQ7
```

You can test the module on your local machines with full functionality with the provided key.



When you install the software online, without purchasing a license, only the free and basic functionalities of Cart2Quote will be enabled. You will need to set the extension to enabled.



Checklist:

1. **Merge the Cart2Quote install files with the Magento root folder.**
2. **Merge the right IonCube files with the Magento root folder.**
3. **Enable compilation mode**
4. **Flush Magento Cache**
5. **Flush Cache Storage**
6. **Flush Catalog Images Cache**
7. **Flush JavaScript/CSS Cache**
8. **Logout and login from your admin panel**
9. **Insert the license key.**



2) Configuration after installation

In this section, the most important configuration settings are explained to test if Cart2Quote is properly installed and functioning on your development server.

1) Configure the front-end visibility of Cart2Quote

Setting	Value	Action
Use Cart2Quote template files / enable front-end functionality	Yes	[STORE VIEW]
Detail page activation	Yes	[STORE VIEW]
List/Grid page activation	Yes	[STORE VIEW]

Only use Cart2Quote's backend functionality? Set "Use Cart2Quote template files / enable front-end functionality" to "No" Cart2Quote will be disabled completely for the front-end.

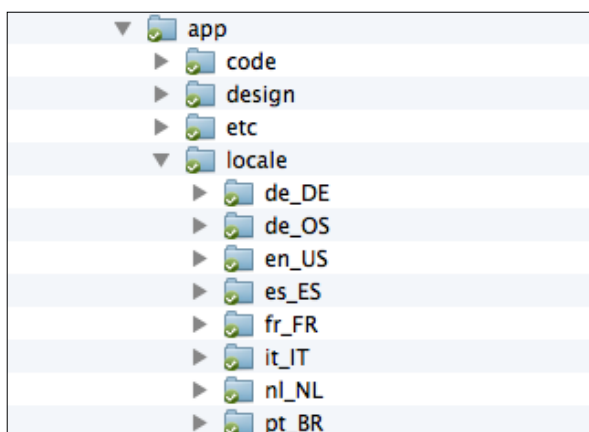
When you already have a custom template/theme installed, it is advised to set the options: Detail page activation and List/Grid page activation to "No". Your theme files for these pages will not be overwritten by Cart2Quote's.

By selecting "No" you will have to compare Cart2Quote's template files with your custom theme files and manually paste relevant code in it. Find out how to [manually enter buttons in your theme](#).

[\(System > Configuration > Cart2Quote > Quotations > Frontend visibility\)](#)

2) Set your language

Cart2Quote comes with 7 languages included. If your country_LANGUAGE folder is missing, please add the Ophirah_Qquoteadv... files to your country_LANGUAGE folder and translate them if necessary.



3) Configure tax settings

Since version 4.1.5 Cart2Quote supports all Magento tax setting. Your catalog base prices can be set to including or excluding tax. Cart2Quote will follow the behavior of the Magento tax settings, but we recommend entering the prices in the backend excluding tax

[\(System > Configuration > Sales > Tax\)](#)

4) Configure shipping methods

Cart2Quote relies on the flat rate option to correctly display the shipping information on the quote. You can turn on the flat rate in the configuration of Magento.

[\(System > Configuration > Sales > Shipping Methods\)](#)

Shipping Methods		
Flat Rate		
Enabled	<input type="text" value="Yes"/>	[WEBSITE]
Title	<input type="text" value="Flat Rate"/>	[STORE VIEW]

5) Test the module

Open a product and set “Allow Quote Requests” to “Yes” and Save the page.

Visibility *	<input type="text" value="Catalog, Search"/>	[STORE VIEW]
Set Product as New from Date	<input type="text"/>	[GLOBAL]
Set Product as New to Date	<input type="text"/>	[GLOBAL]
In feed	<input type="text" value="No"/>	[GLOBAL]
Allowed to Quote Mode	<input type="text" value="Yes"/>	[STORE VIEW]

* Make sure the product is enabled, part of a website and category and is in stock

** Make sure Cart2Quote is enabled also. Go to System/Cart2Quote/General

*** For configurable/bundle/grouped products, make sure all child products are also set to quotable status or else the parent product will not be enabled for quotes.

[\(Catalog > Manage Products > \[product\] > General\)](#)

Go to the front-end (or backend) and add this product to the quotation list, enter your details, submit the form and process the quotation in the backend, submit it back to the customer and, as a customer accept and checkout, with the proposed prices.



3) Cart2Quote Back-end Configuration Settings

In this section, Cart2Quote's configuration screen in the back-end will be explained. The most relevant items in each tab of the configuration of Cart2Quote in the Magento Admin Panel will be discussed in further detail.

1) General

Quotations

Cart2Quote (Version 5.0.4) Provided by Ophirah | E-commerce Projects
For documentation and support visit cart2quote.zendesk.com or contact support@cart2quote.com

Enable Cart2Quote: Yes [STORE VIEW]

Licence Key: [GLOBAL]

Use Built-in Template Files: Yes [STORE VIEW]

▲ Don't set more than one license.
[Buy a License](#) or [Compare Versions](#).

▲ Set to NO to disable the front-end functionality of Cart2Quote or when manually copying Cart2Quote template and layout information into a custom theme.

Enable Cart2Quote

With the "Enabled" option you can choose to enable/disable the output the Cart2Quote extension produces. This means that when the option is set to "Disabled", you should not see anything related to Cart2Quote in the front-end. However the Cart2Quote extension will remain active and accessible in your admin section.

License Key

For almost all versions of the Cart2Quote extension a license key is required. The only exception to this is when you are using the trial version, in this case you can leave the "License key" field blank.

Note: If you're using license keys for multiple domains, be sure to separate them with a semicolon ";".
Information: For information about the different versions available follow this [link](#).

Use Built-in Template Files

If this option is set to "No", you have to manually copy the Cart2Quote template and layout information to your own template and layout files to enable the front-end functionality. Cart2Quote will be disabled completely for the front-end. When you already have a custom template/theme installed, it is advised to set the options "Detail page activation" and 'List/Grid page activation' to "No". Cart2Quote will not overwrite your theme files for these pages. By selecting "No" you will have to compare Cart2Quote's template files with your custom theme files and manually paste relevant code in it.



Orderability and Prices ▲

Not2Order (Version 2.0.9) Provided by Ophirah | E-commerce Projects
 For documentation and support visit www.cart2quote.com or contact support@cart2quote.com

Enable Not2Order	<input type="text" value="Yes"/>	[STORE VIEW]
Use Built-in Template Files	<input type="text" value="Yes"/>	[STORE VIEW]
	<small>▲ If set to 'No', you have to manually adjust your templates to enable the functionality of Not2Order.</small>	
Auto Hide Order Button	<input type="text" value="Yes"/>	[STORE VIEW]
	<small>▲ Feature only works in combination with Cart2Quote. Product needs to have 'Quotation Conditions' set.</small>	

Enable Not2Order (Cart2Quote extension)

Simply prevent your customers from seeing your prices when the order functionality is disabled. Enable or disable the order functionality for any individual product, product range, storeview, store or complete website. Optionally show price for registered customers. This extension gives you full control whether your products should show prices and add-to-cart buttons and which ones have their prices and/or Add to Cart button hidden. Go to the website of Not2Order for more information and buying options.

2) Quote Front-end

Catalog ▲

Product Page Activation	<input type="text" value="Yes"/>	[STORE VIEW]
	<small>▲ Show or hide the add to quote button on the product detail page.</small>	
Category Page Activation	<input type="text" value="Yes"/>	[STORE VIEW]
	<small>▲ Show or hide the add to quote button on the product list/grid page.</small>	
Ajax Add to Quote	<input type="text" value="Yes"/>	[STORE VIEW]
	<small>▲ Opens Ajax popup when adding product to Quote Request.</small>	

Product Page Activation

Enable/disable the 'Add to Quote button' in the front-end layout for the product detail page.

Category Page Activation

Enable/disable the 'Add to Quote button' in the front-end layout for the product List/Grid page.

Ajax Add to Quote

Set this option to "Yes" if you want to show a dialog with the message that your product is added to the quotation list instead of going to the quotation list or a notification depending on what is chosen in the option General - After adding a product redirect to quotation list.



Shopping Cart / Quote List	
Hide Order References	<input type="text" value="No"/> [?] [STORE VIEW] <small>▲ Hide order buttons and references on quote submit page. To disable order functionality please use Not2order.</small>
Disable Qty Tier Request	<input type="text" value="No"/> [?] [STORE VIEW] <small>▲ Hide option to request quotes for multiple quantities per item.</small>
Registration Mode	<input type="text" value="Allow Quote submission with a known email ad"/> [?] [STORE VIEW] <small>▲ Cart2Quote will check the form for a known emailaddress. When a login is not required for existing users, the user will also not be logged in automatically after a quote is submitted.</small>

Hide Order References

Set this option to "Yes" if you want to hide Shopping cart related buttons on the request for quote page. If you choose not to use the order functionality please consider using [Not2order](#).

Disable Qty. Tier Request

Set this option to "Yes" if you want to hide the option to request quotes for multiple quantities per item.

Registration Mode

You can use this option to determine if a customer needs to be a registered user before submitting a request quote. If you set this option to "No" a login is required before submitting, when "Yes" is selected you don't need to. This means any customer registered or not-registered can request a quote. If a not-registered customer requests a quote the customer automatically becomes a registered user with the information that was used for the request.

3) Quote Form Builder

Options	
Require Shipping Details	<input type="text" value="No"/> [?] [STORE VIEW]
Require Billing Details	<input type="text" value="No"/> [?] [STORE VIEW]
Enable Newsletter Signup	<input type="text" value="No"/> [?] [STORE VIEW]
Hide Shipping Quote for Non-logged in Users	<input type="text" value="Yes"/> [?] [STORE VIEW]

Require Shipping Details

When this option is set to "Yes" it is required to provide shipping details with a quote request.

Require Billing Details

When this option is set to "Yes" requesting a quote will require billing details.

Enable Newsletter Signup

When this option is set to "Yes" customers have the ability to sign up for the newsletter.

Hide Shipping Quote for Non-logged in Users

When this option is set to "Yes" it hides the shipping details in the quotation overview of the client. When this option is set to "Yes" it disables requesting shipping quotes for guests and shipping quotes will only be available for logged in users.



Account Details		
Email Address	Yes and Required	[STORE VIEW]
Firstname	Yes and Required	[STORE VIEW]
Lastname	Yes and Required	[STORE VIEW]
Telephone	No	[STORE VIEW]
Company	No	[STORE VIEW]
VAT/Tax Id	No	[STORE VIEW]

Telephone

Set this option to "Yes" to show the telephone field and no to hide the telephone field on the quotation form. If this option is set to "Yes and required" the displayed telephone field is also required to fill out by the client in order to submit the quotation form.

Company

Set this option to "Yes" to show the company field and no to hide the company field on the quotation form. If this option is set to "Yes and required" the displayed company field is also required to fill out by the client in order to submit the quotation form.

VAT/Tax Id

Set this option to "Yes" to show the VAT number field and no to hide the VAT number field on the quotation form. If this option is set to "Yes and required" the displayed VAT number field is also required to fill out by the client in order to submit the quotation form.

Address Details		
Address	Yes and Required	[STORE VIEW]
Zip	Yes and Required	[STORE VIEW]
City	Yes and Required	[STORE VIEW]
Country	Yes and Required	[STORE VIEW]
State	No	[STORE VIEW]
<small>▲ For some countries such as Canada and the United States Magento is preconfigured to require the customer to specify the state.</small>		

State

Set this option to 'Yes' to show the State field and no to hide the State field within the address details on the quotation form. If this option is set to 'Yes and required' the displayed State field is also required to fill out by the client in order to submit the quotation form.

Note: The address details are only visible if a guest or user has to enter shipping details.



4) Quote E-mails

Sales Representatives	
Email Sender	<input type="text" value="General Contact"/> [?] [STORE VIEW]
Send Quote Email Copy to:	<input type="text"/> [?] [STORE VIEW] <small>▲ Separate by ";".</small>
Send BCC to Linked Sales Representative	<input type="text" value="No"/> [?] [STORE VIEW] <small>▲ The Magento Admin User email of the linked sales representative will be used. Cart2Quote Enterprise license and higher required. Upgrade</small>

E-mail Sender

With this option you can select the sender from which the e-mail will be sent.

Send Quote E-mail Copy to:

Specify the e-mail addresses where a copy of the quote will be send to. If you are using multiple addresses use a semicolon ";" to separate these.

Send BCC to Linked Sales Representative

Select "Yes" if you a want to send a BCC to the assigned sales representative.

Email Templates	
New Account Template	<input type="text" value="cart2quote new account responsive (Default T"/> [?] [STORE VIEW] <small>▲ Select email to be send.</small>
New Request Template	<input type="text" value="cart2quote request details responsive (Default"/> [?] [STORE VIEW] <small>▲ Select email to be send.</small>
New Proposal Template	<input type="text" value="cart2quote proposal responsive (Default Templ"/> [?] [STORE VIEW] <small>▲ Select email to be send.</small>
Request Cancelled Template	<input type="text" value="cart2quote cancel responsive (Default Templat"/> [?] [STORE VIEW] <small>▲ Select email to be send.</small>
Request Reject Template	<input type="text" value="cart2quote reject responsive (Default Template"/> [?] [STORE VIEW] <small>▲ Select email to be send.</small>
Expire Proposal Template	<input type="text" value="cart2quote expire responsive (Default Templat"/> [?] [STORE VIEW] <small>▲ Select email to be send.</small>
Reminder Proposal Template	<input type="text" value="cart2quote reminder responsive (Default Temp"/> [?] [STORE VIEW] <small>▲ Select email to be send. Enterprise edition only.</small>
Proposal Accepted	<input type="text" value="cart2quote accepted responsive (Default Temp"/> [?] [STORE VIEW] <small>▲ Select email to be send.</small>

This section explains the different e-mail templates that can be set with Cart2Quote. Cart2Quote simply uses the templates available in Magento. More information on how to make e-mail templates can be found online. (e.g. [here](#))

New Account Template

Here you can specify the e-mail template for the e-mail that is send when an account is created or choose to disable the sending of this e-mail.

New Request Template

Here you can specifying the e-mail templates for the e-mail that is send when a new request for a quote is made or choose to disable the sending of this e-mail.



New Proposal Template

Here you can specify the e-mail template for the e-mail that is send when a new proposal for a quote is made or choose to disable the sending of this e-mail.

Request Cancelled Template

Here you can specify the e-mail template for the e-mail that is send when a request is cancelled or choose to disable the sending of this e-mail.

Request Reject Template

Here you can specify the e-mail template that is send when a request is rejected or choose to disable the sending of this e-mail.

Expire Proposal Template

Here you can specify the e-mail template for the e-mail that is send when a proposal is expired or choose to disable the sending of this e-mail.

Reminder Proposal Template

Here you can specify the e-mail template for the e-mail that is send as a reminder for the proposal or choose to disable the sending of this e-mail.

Proposal Accepted

Here you can specify the e-mail template for the e-mail that is send when the proposal is accepted or choose to disable the sending of this e-mail.

Attachments	
Enable PDF Proposal	<input type="text" value="Yes"/> [?] [STORE VIEW] <small>▲ The price proposal will also be attached as PDF.</small>
Add Product Short Description Text to PDF	<input type="text" value="Yes"/> [?] [STORE VIEW]
Enable Standard Document	<input type="text" value="Bestand kiezen"/> <input type="text" value="Geen bestand gekozen"/> [STORE VIEW] default/Terms_and_Conditions.pdf <input type="checkbox"/> Delete File [?] <small>▲ Upload any file as default attachment to the proposal email. (i.e. Terms and Conditions) NOTE: Some providers limit the size of emails.</small>

Enable PDF Proposal

If you set this option to "Yes" a PDF is created when a proposal is submitted and will be attached to the e-mail.

Add Product Short Description Text to PDF

Set this option to "Yes" if you want to include the short description of the product(s) in the PDF file.

Enable Standard Document

With this option you can select a file that will be attached to the proposal e-mail (i.e. Terms and Conditions).

Note: Some providers may limit the size of e-mails.



5) Quote Configuration

Expiration Times and Notices

Default Expiration Time Proposals	<input type="text" value="30"/>	[?] [STORE VIEW]
	▲ In days.	
Default Reminder Notice	<input type="text" value="1"/>	[?] [STORE VIEW]
	▲ In days. Set to "0" to disable this feature. This notice is available in the Cart2Quote Enterprise edition. (Upgrade)	

Default Expiration Time Proposals

With this option you can set the number of days it takes for a quote proposal to expire.

Default Reminder Notice (Cart2Quote Enterprise)

This option determines after how many days a reminder will be send for active quotes. Set the value to "0" to disable the reminder feature.

Proposal

Auto Proposal	<input type="text" value="No"/>	[?] [STORE VIEW]
	▲ Price proposals are send automatically, based on standard catalog prices including price tiers. Cart2Quote Business license and higher required. (Upgrade)	
Lock Proposal	<input type="text" value="No"/>	[?] [STORE VIEW]
	▲ Proposal items cannot be removed or added from quote via the shopping cart.	
Show Items Price	<input type="text" value="No"/>	[?] [STORE VIEW]
	▲ Disable to hide individual item prices in PDF, email and customer dashboard by default. (Only show totals)	
Show Quote Adjustment to Customers	<input type="text" value="No"/>	[?] [STORE VIEW]
	▲ Total quote discount will be visible for customers in the Proposal total block.	
Allow Negative Profit	<input type="text" value="No"/>	[?] [STORE VIEW]
	▲ When enabled quote proposals can be sent with negative profit.	
Set Standard (Fixed) Remark with Proposal	<input type="text" value="Prix ne pût pas"/>	[?] [STORE VIEW]
	▲ Add remark that appears in new proposal email and in the quote proposal PDF.	

Auto Proposal (Cart2Quote Business or higher)

When this option is set to "Yes" a proposal will be send automatically based on the standard (tier) prices of the product.

Lock Proposal

When set to "Yes" proposal items cannot be removed or added from a quote via the shopping cart when the quote is confirmed.

Show Items Price

Set this option to "No" to hide the individual item prices in PDF, E-mail and Customer dashboard. By default these will now only show total prices.



Show Quote Adjustment to Customers

Set this option to "Yes" if you want your customers to see the total quote adjustment.

Allow Negative Profit

When this is option is set to "Yes" you will be allowed to send a proposal that has a negative profit.

Set Standard (Fixed) Remark with Proposal

With this option you can set a default remark for your proposals that will appear in the proposal e-mails and PDF.

Quote Number Format	
Default Quote Prefix	<input type="text" value="Q15."/> [?] [STORE VIEW]
Current Numeral Value	<input type="text" value="517"/> [?] [STORE VIEW]
Default Increment	<input type="text" value="1"/> [?] [STORE VIEW]
Pad Length	<input type="text" value="5"/> [?] [STORE VIEW]

▲ Desired number length without the prefix. Set to 0 to not add leading zeros to doc number.

Default Quote Prefix

Here you can define the prefix that is used for numbering your quotes.

Note: The quote number is a combination of the quote prefix and a numeral value.

Current Numeral Value

Here you can define the current numeral value. This is automatically set to the last one that is used.

Default Increment

Here you can set the value with which the numeral value part of the quote number should increment.

Pad Length

Here you can specify the length of the numeral part of the quote number. If this is set 0 or is left empty then it will add leading zero's meaning it will just have the incremented value as numeral part.



6) Sales Representatives

Quote Assignment

Assign Sales Representative	<input type="text" value="Yes"/> [?] [STORE VIEW]
	<small>▲ New quotes are assigned automatically, rotating the admin users in the auto assign role below.</small>
Auto Assign Role	<input type="text" value="Administrators"/> [?] [STORE VIEW]
	<small>▲ Admin users with this role and with an active status are used to assign new quote request to based on rotation.</small>
Sticky Sales Representative	<input type="text" value="Yes"/> [?] [STORE VIEW]
	<small>▲ Assign quotes from existing customers to the sales representative who is linked to the previous request from the customer. This overwrites the auto assign role.</small>
Assign Quote to Logged in Sales Representative	<input type="text" value="Yes"/> [?] [STORE VIEW]
	<small>▲ When an admin user is logged in the backend and creates a quote in the frontend then this user is assigned to the quote by default. This transcends the sticky and rotation assignment. Cart2Quote Business license and higher required. (Upgrade)</small>

Assign Sales Representative

By selecting "Yes" an admin user will be assigned as sales representative when a quote request is created. As default the user will be selected from a pool of users that have the role as is specified in the option "Auto assign role". The assigning of users will happen in a rotating fashion.

Note: The auto assign function only assigns users that have active an active status.

Note: Assigning of the sales representative happens in the following order: Logged in -> Previous ->Auto assign by rotating.

Auto Assign Role

Here you can choose the role from which the Auto Assign function should pick the users as a sales representative for a newly created quote.

Note: The auto assign function only assigns users that have active an active status.

Note: The assigning of the sales representative happens in the following order: Logged in -> Previous ->Auto assign by rotating

Information: Included in the Business version is the ability to link specific sales representatives to customers and quotes. When using this feature it comes in handy to be able to show the details of this linked sales representative in the e-mails regarding the quotation. This way, customers can get in contact directly with the person that created or will create the quote.

To use the e-mail including the sales representative add the following in the e-mail template:

Sales Representative Email: `{{var quote.getSalesRepresentative().getEmail()}}`

Sales Representative Name: `{{var quote.getSalesRepresentative().getName()}}`

Sales Representative Telephone: `{{var quote.getSalesRepresentative().getTelephone()}}`

Sticky Sales Representative

When this option is set to "Yes" a newly created quote will be assigned to the sales representative that handled previous quote from this customer. If this is the first quote the customer has created a one of the other assigning methods applies.

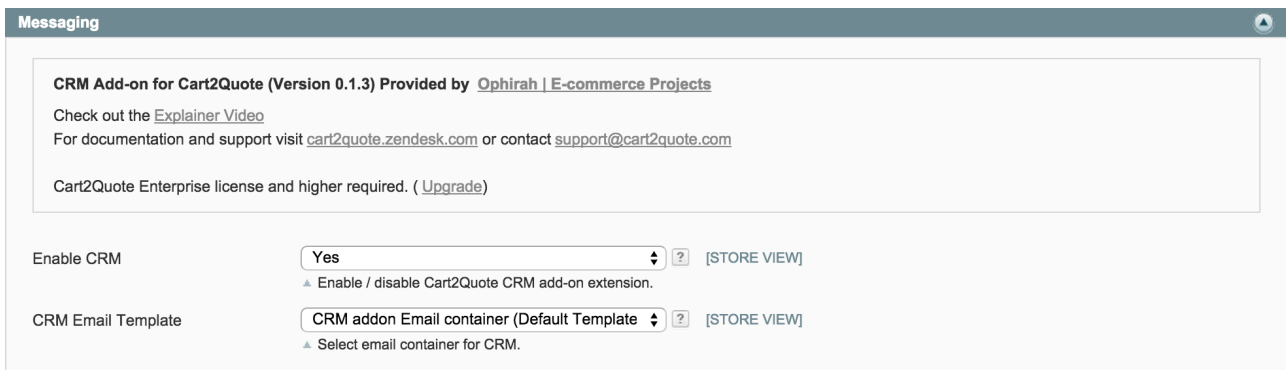


Note: Assigning of the sales representative happens in the following order: Logged in -> Previous ->Auto assign by rotating

Assign Quote to Logged in Sales Representative (Cart2Quote Business or higher)

Setting this option to "Yes" means when a user is logged in the back-end while creating a quote in the front-end the quote will be automatically assigned to that user. This option transcends the auto assign by role and previous quote behavior.

Note: Assigning of the sales representative happens in the following order: Logged in -> Previous ->Auto assign by rotating



The screenshot shows the 'Messaging' configuration page. At the top, it says 'CRM Add-on for Cart2Quote (Version 0.1.3) Provided by Ophirah | E-commerce Projects'. Below this, there are links for an 'Explainer Video' and documentation/support. A note states 'Cart2Quote Enterprise license and higher required. (Upgrade)'. The main configuration area has two settings: 'Enable CRM' is set to 'Yes' with a help icon and a '[STORE VIEW]' link; its description is 'Enable / disable Cart2Quote CRM add-on extension.' The second setting is 'CRM Email Template' set to 'CRM addon Email container (Default Template)' with a help icon and a '[STORE VIEW]' link; its description is 'Select email container for CRM.'

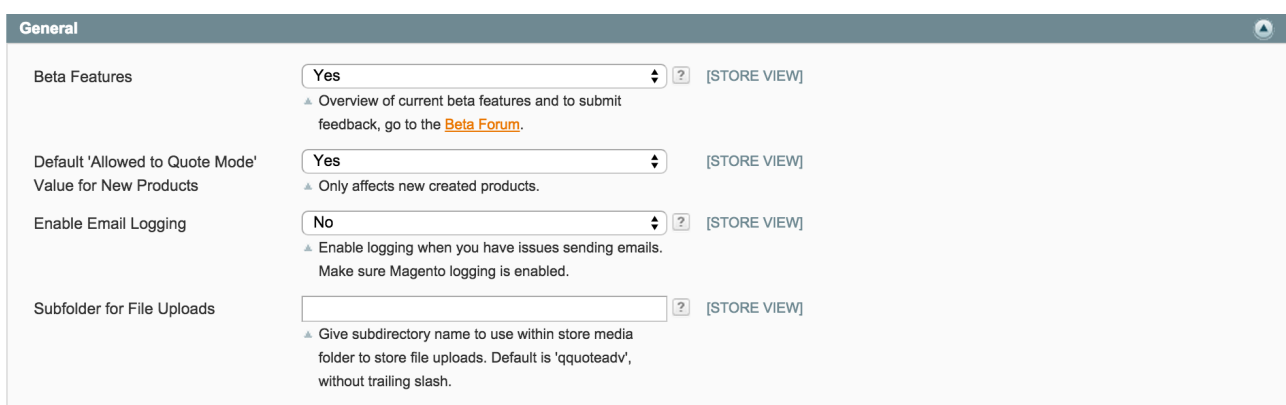
Enable CRM (Cart2Quote Enterprise or higher)

Set this option to "Yes" to enable client messaging for the Cart2Quote quotations module.

CRM E-mail Template (Cart2Quote Enterprise or higher)

Select the default messaging template. By default messages from the CRM extension will be send using this message template.

7) Advanced Settings



The screenshot shows the 'General' configuration page. It has four settings: 'Beta Features' is set to 'Yes' with a help icon and a '[STORE VIEW]' link; its description is 'Overview of current beta features and to submit feedback, go to the Beta Forum.' 'Default 'Allowed to Quote Mode' Value for New Products' is set to 'Yes' with a help icon and a '[STORE VIEW]' link; its description is 'Only affects new created products.' 'Enable Email Logging' is set to 'No' with a help icon and a '[STORE VIEW]' link; its description is 'Enable logging when you have issues sending emails. Make sure Magento logging is enabled.' 'Subfolder for File Uploads' is an empty text field with a help icon and a '[STORE VIEW]' link; its description is 'Give subdirectory name to use within store media folder to store file uploads. Default is 'qqquoteadv', without trailing slash.'

Beta Features

With the "Beta Features" option you can choose to use the beta features that are available. If this option is set to "Yes", you can use all the Beta features that are included in your installed version of the Cart2Quote extension. To check which Beta features are available for you visit [release notes](#) and look for your Cart2Quote version.



Default 'Allowed to Quote Mode' Value for New Products

Set this option to "Yes" to make new products quotable by default.

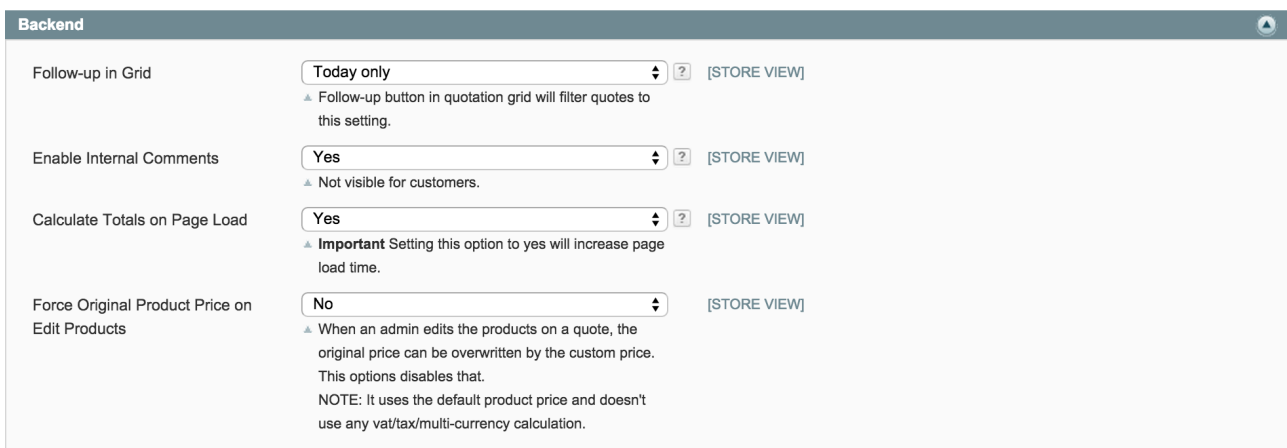
Enable E-mail Logging

Set this option to "Yes" if you having issues with sending e-mails, Cart2Quote will log the e-mail actions. Make sure Magento logging is enabled.

You can find the logs in: **var > log > c2q_email.log**

Subfolder for File Uploads

By default uploaded files within the Cart2Quote extension will be located at /media/qquoteadv/. If you upload files that are attached to a quote they will be placed in a sub-folder named after the ID of that particular quote. With this option you can change only the folder where files are stored that are attached to a quote.



Setting	Value	Help	Store View
Follow-up in Grid	Today only	Follow-up button in quotation grid will filter quotes to this setting.	[STORE VIEW]
Enable Internal Comments	Yes	Not visible for customers.	[STORE VIEW]
Calculate Totals on Page Load	Yes	Important Setting this option to yes will increase page load time.	[STORE VIEW]
Force Original Product Price on Edit Products	No	When an admin edits the products on a quote, the original price can be overwritten by the custom price. This options disables that. NOTE: It uses the default product price and doesn't use any vat/tax/multi-currency calculation.	[STORE VIEW]

Follow-up in Grid

Set this option to "Yes" to hide quotes in the overview that have an expired follow up date in the admin section.

Enable Internal Comments

Set this option to "Yes" if you want to make use of internal comments these comments will only be visible for back-end users and not for the customers.

Calculate Totals on Page Load

When this option is set to "Yes" the quote totals will be loaded on page load. This can dramatically increase load time. We recommend setting this option to "No".

Force Original Product Price on Edit Products

When an admin edits the products on a quote, the original price can be overwritten by the custom price. This option disables that.

Note: It uses the default product price and doesn't use any vat/tax/multi-currency calculation.



Checkout

Auto User Login: No [STORE VIEW]
▲ Adds links to proposal email that enable automatic user login - only available in Business and Enterprise edition.

Checkout Onepage Url: checkout/onepage/index [STORE VIEW]
▲ Default checkout url.

Enable Alternative Checkout: No [STORE VIEW]

Auto User Login (Cart2Quote Business or higher)

Setting this option to "Yes" enables customers to login automatically from a link included in the e-mail templates. The customer will be directed to the customer dashboard or even directly to the Magento checkout.

Before sending the proposal e-mail to the customer, Cart2Quote generates a random number token (a large enough number to prevent guessing).

Checkout Onepage Url

Here you can define your checkout URL when you are using the default of Magento you use the value "checkout/onepage/index". If you want to use an alternative checkout onepage and want it to be used with the Cart2Quote extension replace the value with the alternative URL.

Enable Alternative Checkout

When this option is set to "Yes" you are able to use an alternative checkout URL.

Note: When using this feature, the Quote items will NOT be placed in the shopping cart

Mass Update

Mass Update Quote Attribute: No [STORE VIEW]

Product Id Ranges [STORE VIEW]

Update

▲ Be sure to save if you have made any changes before you update.

Mass Update Quote Attribute

With this option you can set to allow or disallow quote requests for mass updating products. Set this option to "Yes" if you want the product(s) specified in the field "Product id ranges" to be allowed for quote requests.

Important note: You need to be sure that the values used are correct, because your database will be directly updated with these values.

Product Id Ranges

In this field field you can specify the product id's which you want to update. The value that will be used for updating is determined in the field "Mass update quote attribute". You can specify product id's separately or in id ranges. Product id's are separated with a comma "," and for the ranges you start with the first product id of the range followed by a dash "-" then end with the product id with which you want to end the range. To find out which product id's you can use, go to your "Manage products" page and look for ID in the header of the grid. This page is found in the menu "Catalog" visible when logged in to the back-end.



Example: Say you want to update the products with the id's 1, 4 to 6 and 10 to 20 you can do this by entering: *1,4-6,10-20*

Important note: You need to be sure that the id's you specified are indeed product id's, because your database will be directly updated with these values.



4) Troubleshooting Cart2Quote, API and installation tips

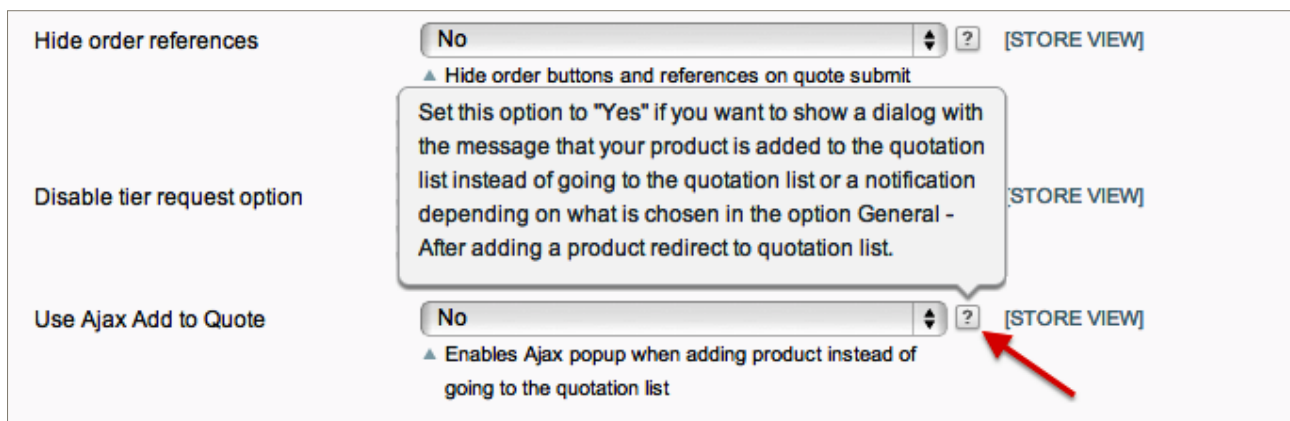
There are several other sources of information with regard to installing, configuring and using Cart2Quote.

1) User forums and support articles

For general instructions and 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 tool

This manual is accompanied by a [User Manual](#). This manual explains how your website visitor will experience Magento Quotations in the front-end and it shows how a shop admin is able to process quotation requests on a daily basis in the back-end. We have also added a help tool for all the options in the Cart2Quote configuration settings. Just hover over the question mark and a help text will appear.



3) API information

Cart2Quote Enterprise users can also use our API. For more information download 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 if you do not have the necessary knowledge of Magento modules' installations. Cart2Quote has a core team of experienced professionals who are dedicated to offering Cart2Quote software installation, configuration and fine-tuning. Order [installation/development support](#) here.

