

Guide for Request Quote for Magento 2

Request Quote extension by Sprinx Technolabs comes with increased functionality for magento2 stores in which buyers can directly communicate with the store owner for requesting a quote for selected product with quote price and quantity.

- User friendly interface.
- Two way communication between buyer and seller using e-mail.
- Optimised tracking of request for quote and its processes.
- Tool to attract bulk orders for stores.

I. Request a quote - Customer Action

1. Login into website.

What's New Women ▾ Men ▾ Gear ▾ Training ▾ Sale Kid's ▾

Customer Login

Registered Customers

If you have an account, sign in with your email address.

Email ^{*}

Password ^{*}

Show Password

[Sign In](#) [Forgot Your Password?](#)

^{*} Required Fields

New Customers

Creating an account has many benefits: check out faster, keep more than one address, track orders and more.

[Create an Account](#)

Enter the credentials
And sign in.

2. Choose the product and add it to your quote.

The screenshot displays the LUMA website interface. At the top left is the LUMA logo. To the right, there is a search bar with the text "Search entire store here..." and a shopping cart icon. Below the logo is a navigation menu with categories: "What's New", "Women", "Men", "Gear", "Training", "Sale", and "Kid's". The "Gear" category is currently selected. Below the navigation is a breadcrumb trail: "Home > Summit Watch".

The main product area features a large image of the Summit Watch, which has a black strap and a dark face with a digital display. To the right of the image, the product name "Summit Watch" is displayed, followed by a link "Be the first to review this product". The price is listed as "\$54.00" and the status is "IN STOCK" with SKU# 24-MG03. Below the price is a quantity selector labeled "Qty" with a dropdown menu showing "1". A blue "Add to Cart" button is positioned below the quantity selector. Underneath are three buttons: "ADD TO WISH LIST" (with a heart icon), "ADD TO COMPARE" (with a list icon), and "ADD TO REQUEST QUOTE" (with a shopping cart icon). An orange arrow points from a callout box to the "ADD TO REQUEST QUOTE" button.

Click here to add product To your quote.

Enter the quantity in 'Qty' field while adding the product to your quote.

Counter shows total number of products in your quote.

The screenshot displays the LUMA website interface. At the top left is the LUMA logo. The top right features a navigation bar with 'MY REQUEST QUOTE(1)' and a search bar. Below the navigation bar is a menu with categories: What's New, Women, Men, Gear, Training, Sale, and Kid's. A green notification banner states 'Product has been added to your quote successfully'. The main content area shows the 'Summit Watch' product. The watch is a black and olive green digital sports watch. The price is \$54.00. The product is marked as 'IN STOCK' with SKU# 24-MG03. Below the price is a quantity selector set to '1' and an 'Add to Cart' button. There are also links for 'ADD TO WISH LIST', 'ADD TO COMPARE', and 'ADD TO REQUEST QUOTE'.

Choose products to your quote for requesting a quote.

3. View your quote and submit it to merchant for review:-

Click here to land directly to your quote .

View Request Quote In customer account section.

The screenshot displays the LUMA website interface. At the top, there is a navigation bar with the LUMA logo on the left and a user account menu on the right. The user account menu is open, showing options: "My Account", "My Wish List", and "Sign Out". A red arrow points from the "MY REQUEST QUOTE(7)" link in the navigation bar to a callout box that says "Click here to land directly to your quote .". Another red arrow points from the "My Account" menu item to a callout box that says "View Request Quote In customer account section.". Below the navigation bar, there is a breadcrumb trail: "Home > Gear > Bags > Rival Field Messenger". The main content area features the product "Rival Field Messenger" with a price of "\$45.00" and a status of "IN STOCK". Below the price, there is a quantity selector set to "1" and a blue "Add to Cart" button. At the bottom of the product section, there are three buttons: "ADD TO WISH LIST", "ADD TO COMPARE", and "ADD TO REQUEST QUOTE". The "Rival Field Messenger" product image is a grey messenger bag with multiple pockets and straps.

4. Review your quote and submit to merchant for its action .

The screenshot shows the LUMA website interface for a request for quote. The page title is "Here is your request quote" and the current status is "Preparing". The items listed are:

Item	Price	Qty	Quoted Price
Summit Watch	54,000,000	1	Not Yet
Kenobi Trail Jacket	47,000,000	5	Not Yet
Juno Jacket	77,000,000	1	Not Yet

Callout boxes and their corresponding actions:

- Click here to submit Your quote to merchant.** (Points to the "Submit Quote For Merchant Review" button)
- Click here to view Your submitted quotes.** (Points to the "Click Here To View Your Submitted Quotes" link)
- Edit quantity as per requirement.** (Points to the quantity input field for the Juno Jacket)
- Click here to delete All items in quotes.** (Points to the "Delete All Item" button)

Once request to quote is submitted to merchant, an email is sent to merchant regarding reminder of quote submission seeking for merchant review. Similarly, an email is hence sent back from merchant to customer when request to quote is accepted by merchant.

5. After quote is submitted ,the merchant can view your requested quote with product and respective quantities.The merchant will perform its action as per store’s business norms, and once quote is accepted and quote pricing is done by merchant ,customer can add all products to cart and place the order henceforth.

Click on [‘click here to view your requested quotes’](#) it will display history of your quotes requested so far.

Select the quote and then click ‘view’to see that quote, check the ‘Quote Accepted’ if ‘yes’ you can now add the quote items to cart.

The screenshot shows the LUMA website interface. At the top, there is a navigation bar with the LUMA logo and a search bar. Below the navigation bar, there is a sidebar menu on the left with various user account options. The main content area is titled "Your request quote history" and contains a table with the following data:

Quote Id	Customer Name	Customer Email	Created At	Quote Accepted	Quote Status	Action
13	test sprinik	test@sprinik.com	2022-12-22 06:05:48	yes	active	View

A red arrow points from the "View" button in the table to a callout box that says "Click here to view Respective quote."

6. Now, customer can review its accepted quote and add all items to cart for purchase.




My Downloadable Products
My Wish List
Address Book
Account Information
Stored Payment Methods
My Product Reviews
Newsletter Subscriptions
My Request Quote

Compare Products
You have no items to compare.

Recently Ordered
 Kenobi Trail Jacket
 Augusta Pullover Jacket
 Fusion Backpack
 Cruise Dual Analog Watch
[Add to Cart](#) [View All](#)

My Wish List
You have no items in your wish list.

Current Quote Status: **Empty**

Item	Price	Qty	Quoted Price
 Summit Watch	54.000000	<input type="text" value="1"/>	45
 Kenobi Trail Jacket	47.000000	<input type="text" value="5"/>	42
 Juno Jacket	77.000000	<input type="text" value="1"/>	71

SUMMARY
Total Price Rs : 356
Total Quoted Price Rs : 326
You are Saving Rs : 40

[Add All To Cart](#) [Delete All Item](#)
[Click Here To View Your Submitted Quotes](#)

About us
Customer Service
Search Terms
Privacy and Cookie Policy
Advanced Search
Contact Us

Enter your email address [Subscribe](#)

Click here to add all items To cart.

Products added to cart successfully.

- My Account
- My Orders
- My Downloadable Products
- My Wish List
- Address Book
- Account Information
- Stored Payment Methods
- My Product Reviews
- Newsletter Subscriptions
- My Request Quote**

Compare Products

You have no items to compare.

Recently Ordered

- Kenobi Trail Jacket
- Augusta Pullover Jacket
- Fusion Backpack
- Cruise Dual Analog Watch

[Add to Cart](#) [View All](#)

My Wish List

Here is your request quote

Image	Product Name	Price	Qty	Quoted
	Summit Watch	54.000000	1	45
	Kenobi Trail Jacket	47.000000	5	42
	Juno Jacket	77.000000	1	71

[Add All To Cart](#)

[Delete All Items](#)

[Click Here To View Your Submitted Quotes](#)

7 Items in Cart Cart Subtotal: **\$326.00**

[Proceed to Checkout](#)

Juno Jacket
See Details ▾
\$71.00
Qty:

Kenobi Trail Jacket
See Details ▾
\$42.00
Qty:

Summit Watch
\$45.00
Qty:

[View and Edit Cart](#)

Mini cart view after quote items are added to it. Customer can now review the cart and proceed to checkout.

Thank you for your purchase!

[Print receipt](#)Your order number is: **4000000001**.

We'll email you an order confirmation with details and tracking info.

[Continue Shopping](#)[About us](#)
[Customer Service](#)[china](#) [Search Terms](#)
[Privacy and Cookie Policy](#)
[Advanced Search](#)
[Contact Us](#) [Subscribe](#)

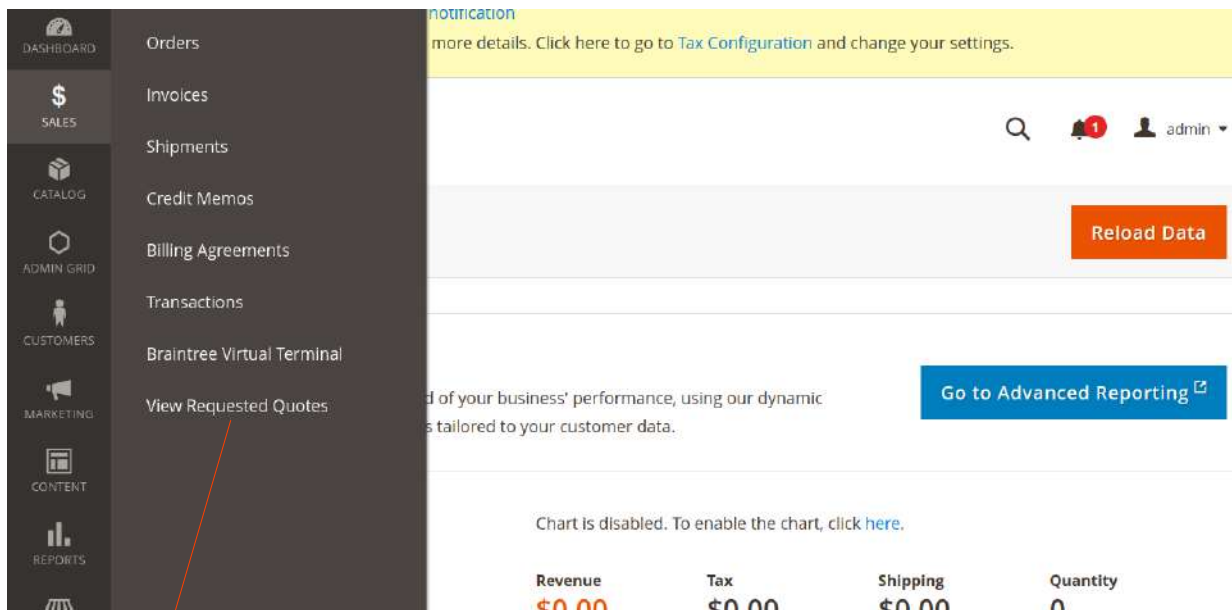
Order is placed successfully. Customer can now check its order status in customer account section.

II. Request a Quote – Merchant Action

Once request to quote is submitted by customer , the merchant receives an email regarding submission of Quote for review.

The merchant can see the requested quotes in Admin Menu settings-:

1. Go to Admin -> Sales -> View Requested Quotes.



Click here to see the Request Quote Received.

The request quote listing contains list of all the request to quote received and their status . It shows lists of quotes once customer have submitted the quotes for merchant review.

2. See the list of Request to Quote Recieved , select the quote and then click View to see the quote items and their quantities.

Please see [documentation](#) for more details. Click here to go to [Tax Configuration](#) and change your settings.

Request Quote Recieved

Search, Notifications, admin

Filters, Default View

Actions, 1 records found, 20 per page, 1 of 1




<input type="checkbox"/>	Quote ID	Customer Id	Customer Name	Customer Email	Quote Status	Customer Action	Price Quoted	Action
<input type="checkbox"/>	13	16	test sprinx	test@sprinx.com	active	submitted	no	View

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[Privacy Policy](#) | [Report an Issue](#)

Click here to view requested quote recieved.

3. View and quote new price for products.

The screenshot shows a dashboard with a sidebar on the left containing navigation icons for Dashboard, Sales, Catalog, Admin Grid, Customers, Marketing, Content, Reports, Stores, System, and Find Partners. The main content area is titled 'Products recieved for quote pricing' and features a table with the following data:

Product	Product Name	Price	Qty	Enter New Price
	Summit Watch	54.000000	1	<input type="text" value="45"/>
	Kenobi Trail Jacket	47.000000	5	<input type="text" value="42"/>
	Juno Jacket	77.000000	1	<input type="text" value="71"/>

Below the table is an orange button labeled 'Quote Price'. A search bar, notification bell, and user profile 'admin' are visible in the top right corner.

Once pricing is done, click here to Save new prices for this quote items.

Enter the new price for quotation.

After pricing is done , customer recieves an email regading sucessfull quote pricing of quote items.

4. Quote status changes from active to order placed once customer places order for the quote items.

The screenshot shows the Magento Admin interface for 'Request Quote Received'. At the top, there is a yellow notification banner with a warning icon and the text: 'Click on the link to [Ignore this notification](#). Please see [documentation](#) for more details. Click here to go to [Tax Configuration](#) and change your settings.'

The main heading is 'Request Quote Received'. On the right, there is a search icon, a notification bell with '1', a user profile 'admin', a 'Filters' button, and a 'Default View' dropdown.

Below the heading, there is a table with the following data:

Quote ID	Customer Id	Customer Name	Customer Email	Quote Status	Customer Action	Price Quoted	Action
13	16	test sprinix	test@sprinix.com	order placed	submitted	yes	View

At the bottom of the page, there is a footer with the text: 'Copyright © 2022 Magento Commerce Inc. All rights reserved.' and 'Magento ver. 2.4.3-p' with links for 'Privacy Policy' and 'Report an Issue'.

A red arrow points from the 'order placed' status in the table to a callout box below.

Quote Status changed to 'order placed' when quote is Added to cart and order is placed by customer.