

**amasty**

See the way [Request a Quote for Magento 2](#) extension works.

# Ultimate Guide for Magento 2 Request a Quote

Boost sales revenue by understanding and meeting customer demand with Magento 2 Quote. Strengthen your competitive position with the personalized purchasing offer.

- Create quotes in one click from product or category pages
- Let customers request quotes for unlimited products quantity
- Provide individualized pricing based on customer details
- Efficiently manage all requests on a quotations grid
- Negotiate over the prices in a convenient way
- Convert Magento 2 quotes into orders in a few simple steps
- Hide prices for specific products or whole categories

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## General Settings

To configure general settings, go to **Stores → Configuration → Amasty Extensions → Request a Quote**.

### General Tab

The extension allows to choose specific customer groups that will be able to request quotes and create them from product or category pages. It also allows to disable quotation for specific product categories.

### General

**Enable 'Request a Quote'** [store view] Yes

**'Add to Quote' button on Product Page** [store view] Show

**'Add to Quote' button on Category Page** [store view] Show

**Disable Quotation for Categories** [store view]

- ... Gear
- ..... Bags
- ..... Fitness Equipment
- ..... Watches
- ... Training

'Add to Quote' button will be hidden for each product from the selected categories. This setting is applied to product list and product page.

**Allow Quote Request for Customer Groups** [store view]

- Not Logged In
- General
- Wholesale
- Retailer

If 'Not Logged In' option is chosen, guest users will insert email addresses upon quote submission and accounts will be created automatically.

**Enable 'Request a Quote'** - set to Yes to enable the extension.

**'Add to Quote' button on Product Page** - Show 'Add to Quote' button if you want your customers to be able to add products to quote cart right from the product page. If not, Hide the button.

**'Add to Quote' button on Category Page** - Show 'Add to Quote' button if you want to let your customers add products to quote requests from the category page. If not, Hide the button.

**Disable Quotation for Categories** - specify product categories for which quote requests will be disabled. 'Add to Quote' button will be hidden for each product from the selected categories.

**Allow Quote Request for Customer Groups** - specify the customer groups to allow quote requests.

If **'Not Logged In' option is chosen**, guest users will insert email addresses upon quote submission and accounts will be created automatically.



Note, that all necessary for registration fields from the Stores → Configuration → Customers → Customer Configuration → Name and Address Options will also be shown on the quote cart for

unregistered users. This way, all the customer information will be collected.

Also, if you are using Magento Commerce, you can create additional Customer Attributes (Stores → Attributes → Customer) for unregistered users, which will be displayed in the quote request form and will be saved in a Customer Account.

The screenshot displays the LUMA Quote Cart interface. At the top left is the LUMA logo. A search bar on the right contains the text "Search entire store here...". Below the logo is a navigation menu with links for "What's New", "Women", "Men", "Gear", "Training", and "Sale".

The main content area is titled "Quote Cart" and features a table with the following columns: "Item", "Price", "Qty", and "Subtotal".

Item	Price	Qty	Subtotal
 <p>Montana Wind Jacket Size: L Color: Red I would also buy a yellow jacket, the same size</p>	\$ 45.00	1	\$45.00
 <p>Taurus Elements Shell Size: S Color: Yellow Do you have the size L ?</p>	\$ 62.00	1	\$62.00

At the bottom of the table are "Clear Quote" and "Update Quote" buttons.

On the right side, a "Quote Summary" sidebar shows:

- Subtotal: \$107.00
- Tax: \$0.00
- Quote Total: \$107.00

Below the summary is a section titled "Enter your details" with the following fields:

- Email Address: veronica@example.com
- Remarks: I'd buy these products if you could give me a discount.
- First Name: Veronica
- Last Name: Harris

A large blue "Submit Quote" button is located at the bottom of the sidebar.

If 'Not Logged In' option is not chosen you will be proposed to fill in the following fields:

**Allow Quote Request for Customer Groups**  
[store view]

- Not Logged In
- General**
- Wholesale
- Retailer

If 'Not Logged In' option is chosen, guest users will insert email addresses upon quote submission and accounts will be created automatically.

**Inform Guests**  
[store view]

Yes ▼

Show 'Login for quote' button for guests

**Button Text**  
[store view]

Login for quote

In such a case, guest visitors will be asked to log in to add products to quote.



- What's New
- Women
- Men**
- Gear
- Training
- Sale

Home > Men > Tops > Hoodies & Sweatshirts > Ajax Full-Zip Sweatshirt



# Ajax Full-Zip Sweatshirt

Be the first to review this product

**\$69.00**

**IN STOCK**  
SKU#: MH12

Size

- XS
- S
- M
- L
- XL

Color Blue



Qty

Add to Cart

Login for quote




Allow to change Price in Quote Cart [website]

Set 'No' to disable price changing for customers in Quote Cart. Automatic quote approval will be disabled as well. Note! If Amasty Hide Price is enabled, the quote will be submitted with 0 price. Please make sure to check the quote before approving.

**Allow to change Price in Quote Cart** - set 'No' to disable price changing for customers in Quote Cart. Automatic quote approval will be disabled as well. The feature is useful in case a customer wants to ask for a discount and get a quote for Magento 2 order, but doesn't know exactly what price to set.


If Amasty Hide Price is enabled, a customer will see the price as N/A. In the admin panel, the quote will be submitted with 0 price. Please make sure to check the quote before approving.

**Approve Quotes Automatically** [store view]  

Set 'Yes' to approve quote automatically if the overall discount is less than certain % amount

**if Quote Discount is Less than (%)** [store view]

The discount is calculated for the entire quote (not for separate products). Note: discount calculation is based on prices excluding tax.

**Cost Attribute** [store view]  

- Empty --
- cost**
- msrp
- price
- special\_price
- tier\_price
- weight

**Approve Quotes Automatically** - this option allows you to approve quotes automatically if the discount of the submitted quote is less than the specified percentage amount.

**if Quote Discount is Less than (%)** - specify the discount percentage amount for automatic quotes approving. The discount is calculated for the entire quote (not for separate products). Note: discount calculation is based on prices excluding tax.

**Cost Attribute** - choose which attribute will be used as 'Cost' attribute. This option will make the decision-making process easier (whether approve or not the quote), because admin will see the difference between requested price and product's cost.

## Expiration & Reminder Tab

The extension allows to set default expiration period for quote requests.

## Expiration & Reminder

**Quote Expiration**  
[store view]

Set default period in days for quote to be valid once approved. For zero and higher this value can be set for each quote individually. Keep empty to disable this feature.

**Send Reminder Email after Day(s)**  
[store view]

Set default period in days to send reminder once quote approved. For zero and higher this value can be set for each quote individually. Keep empty to disable reminder.

**Quote Expiration** - Set default period in days for quote to be valid once approved. For zero and higher this value can be set for each quote individually. Keep empty to disable Magento quote lifetime.

**Send Reminder Email after Day(s)** - Set default period in days to send reminder once quote approved. For zero and higher this value can be set for each quote individually. Keep empty to disable reminder.

## Admin Notifications

With the extension it is possible to configure different notification emails. Admin will get email reports with new quote requests.

## Admin Notifications

<b>Send Email Reports for New Quote Requests</b> <small>[store view]</small>	<input type="text" value="Yes(customize)"/> <b>Yes(customize)</b> Yes(instantly) No
<b>Frequency</b> <small>[global]</small>	<input type="text" value="Daily"/> <b>Daily</b> Weekly Monthly
<b>Start Time</b> <small>[global]</small>	23 : 50 : 00
<b>Admin Email Address</b> <small>[store view]</small>	<input type="text" value="admin@example.com"/> <small>Input an email address, the extension will send notifications to.</small>
<b>Email Template to Notify Admin</b> <small>[store view]</small>	<input type="text" value="Admin Notifications (Default)"/> <small>Select the appropriate template for the email notifications.</small>
<b>Email Sender</b> <small>[store view]</small>	<input type="text" value="General Contact"/>

**Send Email Reports for New Quote Requests** - Choose the option to enable emails to admin with the quote requests that have been recently created or updated. You can notify your admins **instantly** or set a **custom** notification schedule.

**Frequency** - If a *custom* option is chosen, set the necessary frequency: notify admins **Daily, Weekly** or **Monthly**.

**Start Time** - customize the particular time for notifications.

**Admin Email Address** - Input an email address, the extension will send notifications to.

**Email Template to Notify Admin** - Select the appropriate template for the email notifications.

**Email Sender** - specify your company's email from which the notifications will be sent.

## Customer Notifications

Customers will get notifications when their quotes are created, modified, accepted or expired. Also

choose **Email Templates** to notify you customers that their quote has been **Submitted, Approved, Modified, Cancelled** or **Expired**.

### Customer Notifications

Email Sender <small>[store view]</small>	General Contact	▼
Email Template for Submitted Quote <small>[store view]</small>	Submitted Quote Customer Notification (	▼
Email Template for Approved Quote <small>[store view]</small>	Approved Quote Customer Notification (I	▼
Email Template for Modified Quote <small>[store view]</small>	Modified Quote Customer Notification (D	▼
Email Template for Canceled Quote <small>[store view]</small>	Canceled Quote Customer Notification (E	▼
Email Template for Expired Quote <small>[store view]</small>	Expired Quote Customer Notification (De	▼
Email Template for Reminder <small>[store view]</small>	Reminder Quote Customer Notification (I	▼

To create templates, go to **Stores → Marketing → Communications → Email Templates**.

### PDF

The quotes can be downloaded in PDF format both from backend and frontend. In addition, you can automatically attach PDF to the Approved Quote customer notification and configure PDF content according to your needs on the store view level.

## PDF



To use PDF functionality, please install the library dompdf/dompdf. To do this, run the command "composer require dompdf/dompdf" in the main site folder.

Automatically Attach PDF File to Approved Quote Notification  [store view]

Template Content [store view]

```
<!--@vars {
"var customer_telephone|raw":"Customer's
phone number"
"var shipping_telephone|raw":"Shipping
phone number"
"var store_phone|raw":"Store phone
number"
"var quote_expiry_date|raw":"Date of a
quote has expired"
"var shipping_method|raw":"Shipping
method"
"var has_shipping_info|raw":"Has Shipping
Info"
} @-->

<!DOCTYPE html PUBLIC "-//W3C//DTD
XHTML 1.0 Strict//EN"
"http://www.w3.org/TR/xhtml1/DTD/xhtml1-
strict.dtd">
<html
```

To use PDF functionality, please install the library dompdf/dompdf. To do this, run the command "composer require dompdf/dompdf" in the main site folder.

```
-sh-4.2$ composer require dompdf/dompdf
Using version ^0.8.3 for dompdf/dompdf
./composer.json has been updated
Loading composer repositories with package information
Updating dependencies (including require-dev)
Package operations: 4 installs, 0 updates, 0 removals
- Installing sabberworm/php-css-parser (8.3.0): Downloading (100%)
- Installing phenx/php-svg-lib (v0.3.3): Downloading (100%)
- Installing phenx/php-font-lib (0.5.1): Downloading (100%)
- Installing dompdf/dompdf (v0.8.3): Downloading (100%)
dompdf/dompdf suggests installing ext-gmagick (Improves image processing perform
ance)
Package phpunit/phpunit-mock-objects is abandoned, you should avoid using it. No
replacement was suggested.
Writing lock file
Generating autoload files
```

## Quote Requests Management

From the admin panel your can see and manage all the request quotes in a convenient grid, accept/reject a quote or suggest a new best-suited price.

Go to **Stores → Sales → Amasty Request a Quote → Quotes.**

# Quotes

demouser

Create New Quote

Filters | Default View | Columns | Export

7 records found (2 selected) | 20 per page | 1 of 1

- Actions
- Cancel / Close
- Approve

		Purchase Point	Purchase Date ↑	Status	Grand Total	Grand Total (Base)	Action	Expiry Date
<input type="checkbox"/>	1000000016	Main Website Main Website Store Default Store View	Apr 15, 2019 9:10:17 AM	Expired	\$43.30	\$43.30	<a href="#">View</a>	2019-04-23 00:00:00
<input type="checkbox"/>	1000000012	Main Website Main Website Store Default Store View	Apr 15, 2019 9:04:18 AM	Expired	\$81.19	\$81.19	<a href="#">View</a>	2019-04-25 09:05:08
<input checked="" type="checkbox"/>	1000000007	Main Website Main Website Store Default Store View	Mar 4, 2019 10:52:45 AM	Complete	\$30.00	\$30.00	<a href="#">View</a>	N/A
<input checked="" type="checkbox"/>	1000000005	Main Website Main Website Store Default Store View	Mar 4, 2019 10:44:21 AM	Canceled	\$21.65	\$21.65	<a href="#">View</a>	N/A

You can see the **ID** of the quotes, their **Purchase point**, **Purchase Date**, **Status** and **Grand Totals**.

To *Approve* or *Cancel/Close* several quotes in one click, tick them and choose the necessary action in the **Actions** dropdown menu.

Click **View** to see detailed information about quote requests. You can *Edit* and *Approve* the quotes with *Pending* status.

Click **Create New Quote** to create a quote on behalf of customer. After approving a quote it will be visible at customer account page, in 'My Quotes' section.


# Usage Example

To manage all the quotes properly, let's consider an example of a particular quote management from the very beginning.

## Step 1. Creating a Quote by a Customer

First, your customers create quotes from the product or category pages via **Add to Quote** button.

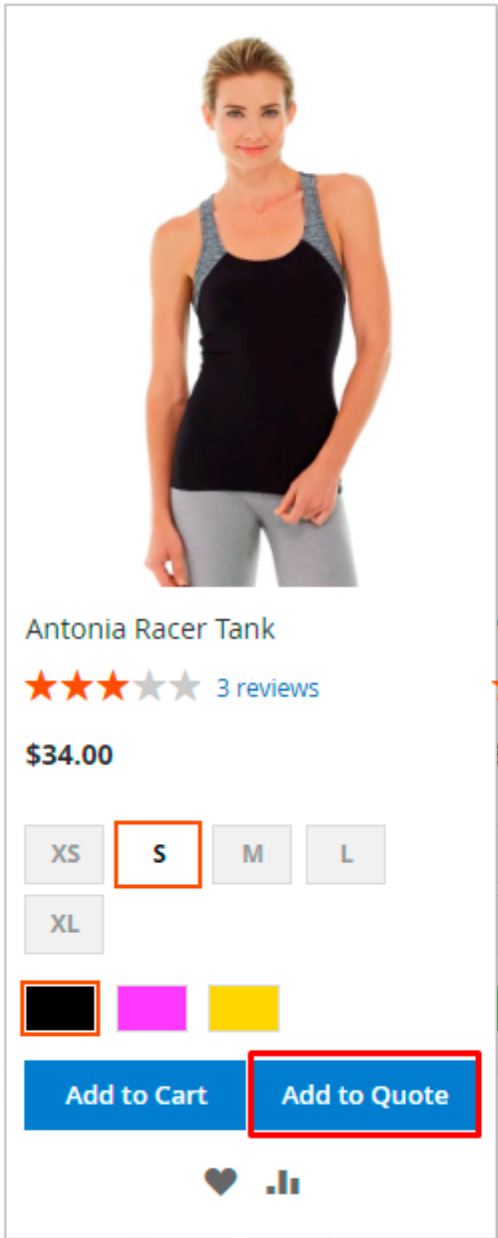
Items 1-9 of 14



**Breathe-Easy Tank**  
★★★★★ 2 reviews  
\$34.00

XS S M L  
XL

Color swatches: Pink, White, Yellow




**Antonia Racer Tank**  
★★★★★ 3 reviews  
\$34.00

XS **S** M L  
XL

Color swatches: Black, Pink, Yellow

**Add to Cart** **Add to Quote**

♥ .li



**Maya Tunic**  
★★★★★ 1 review  
\$29.00


XS S M L  
XL

Color swatches: Green, White, Yellow

The module allows displaying 'Add To Quote' button for custom product types.

Also, customers can move items to quote straight from their Shopping Cart via 'Request a Quote' button.

The screenshot shows the LUMA Shopping Cart interface. At the top, there is a search bar and navigation icons for a wishlist (4 items) and a shopping cart (1 item). Below the navigation is a menu with categories: What's New, Women, Men, Gear, Training, and Sale. The main heading is 'Shopping Cart'. The cart contains one item: 'Radiant Tee' priced at \$22.00 with a quantity of 1, resulting in a subtotal of \$22.00. The item details specify 'Size: S' and 'Color: Orange'. Below the item is a 'Move to Wishlist' link and icons for editing and deleting the item. An 'Update Shopping Cart' button is located at the bottom of the item list. On the right side, a 'Summary' panel shows 'Estimate Shipping and Tax' with a dropdown arrow, a subtotal of \$22.00, and tax of \$1.82, leading to an 'Order Total' of \$23.82. Two buttons are present in the summary: 'Proceed to Checkout' and 'Request a Quote'. A link for 'Check Out with Multiple Addresses' is also visible.

Item	Price	Qty	Subtotal
 Radiant Tee Size: S Color: Orange	\$22.00	1	\$22.00

Summary

Estimate Shipping and Tax

Subtotal \$22.00  
Tax \$1.82

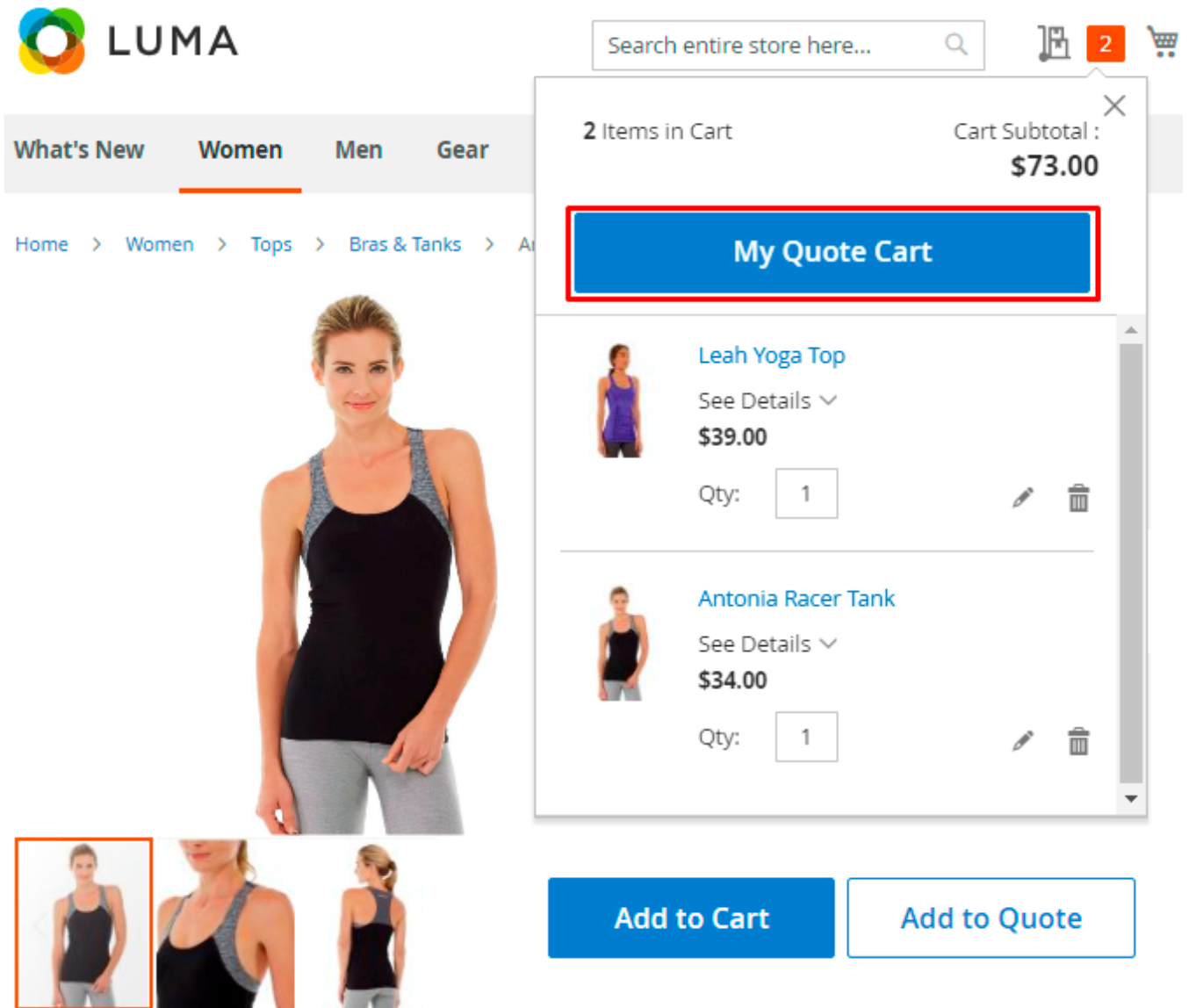
Order Total \$23.82

Proceed to Checkout

Check Out with Multiple Addresses

Request a Quote

Then they go to their **Quote Carts** to view and edit their quote requests.



Magento 2 Quote Extension allows your customers request a quote for unlimited products quantity.

There customers specify the price they want to request, items quantity, add some notes that describe their requests in the *Remarks* field and **Submit Quote**.

If you allowed 'Not Logged In' users to create quotes, they will have to provide additional details before quote submission:




Search entire store here...



- What's New
- Women
- Men
- Gear
- Training
- Sale

# Quote Cart

Item	Price	Qty	Subtotal
 Olivia 1/4 Zip Light Jacket Size: S Color: Blue <a href="#">Add Note</a>	\$ <input type="text" value="70.00"/> <small>Excl. Tax</small>	<input type="text" value="3"/>	\$77.00

## Quote Summary

Subtotal	\$77.00
Tax	\$0.00
<b>Quote Total</b>	<b>\$77.00</b>

## Enter your details

Email Address \*

Remarks

First Name \*

Last Name \*

Online buyers are also able to **Add Notes** per item, **Clear Quotes** and **Update Quotes** right from the cart.





Search entire store here...



What's New Women Men Gear Training Sale

# Quote Cart

Item	Price	Qty	Subtotal
 <p><b>Antonia Racer Tank</b>            Size: S            Color: Black</p> <p>Please, send me your size chart in PDF format, if possible.</p>	\$ <b>30.00</b> <small>Excl. Tax</small>	<b>3</b>	<b>\$34.00</b>
 <p><b>Leah Yoga Top</b>            Size: M            Color: Purple  <a href="#">Add Note</a></p>	\$ <b>30.00</b> <small>Excl. Tax</small>	<b>5</b>	<b>\$39.00</b>

## Quote Summary

Subtotal \$73.00  
 Tax \$6.02

**Quote Total \$79.02**

## Enter your details

### Remarks

I'll purchase 3 Antonia Racer Tanks and 5 Leah Yoga Tops if you give it prices of 30\$ for each item.

**Submit Quote**


[Clear Quote](#) [Update Quote](#)


Magento 2 Quote Extension allows shoppers to request quotes for Simple, Configurable, Downloadable, Virtual, Grouped and Bundle product types. If a customer edits products in a Quote Cart, previous items are removed and replaced with the new ones together with new values. Thus, keep in mind, that the previous custom price is not saved.

## Step 2. Managing a Quote from the Admin Panel


When the quote has been submitted, you will immediately see it on the grid with the *Pending* status.

# Quotes

 demouser ▾

 Filters

 Default View ▾

 Columns ▾

 Export ▾

Actio... ▾

6 records found

20 ▾ per page

<

1 of 1

>

<input type="checkbox"/>	ID	Purchase Point	Purchase Date ↑	Status	Grand Total	Grand Total (Base)	Action
<input type="checkbox"/>	1000000012	Main Website Main Website Store Default Store View	Mar 11, 2019 11:42:35 AM	Pending	\$259.80	\$259.80	<a href="#">View</a>

Click **View** to see the detailed quote information. You can *Approve*, *Edit* the quote or *Download PDF* copy of it.

# #1000000024

[← Back](#)
[Cancel / Close](#)
[Approve](#)
[Download PDF](#)
[Edit](#)

## Quote & Account Information

### Quote # 1000000024

Quote Date	Sep 5, 2019, 1:15:39 PM
Quote Date (UTC)	Sep 5, 2019, 1:14:04 PM
Status	Pending
Created From	Main Website Main Website Store Default Store View
Placed from IP	213.184.226.82

### Account Information [Edit Customer](#)

Customer Name	Veronica Costello
Email	roni_cost@example.com
Customer Group	General
Account Created	Mar 11, 2018, 4:24:23 PM
Orders Total	\$76.03

Product	Cost	Product Price (Excl. Tax)	Quote Price	Qty	Row Total
Maya Tunic SKU: WT07-S-Yellow	\$20.00	\$29.00	\$23.00	1	\$23.00
Nora Practice Tank SKU: WT03-M-Purple	\$23.00	\$39.00	\$30.00	1	\$30.00

## Quote Total

### Remarks for this Quote

### Quote Totals

Subtotal	\$53.00
<b>Grand Total</b>	<b>\$57.37</b>

Here all the information about the customer and the quote request is displayed.

**Product Price** displays a real price at the store. Customer’s request is shown in the **Price** column. **Row Total** is also displayed according to customer’s price.

Also, it is possible to request quotes for products with tier pricing. In this case, the extension takes tier pricing into account and automatically offers best price for your customers. If a user wants to quote for a lower price, you can check the **Tier Price** and the suggested by a customer price in one

place.

## Quote Items

Product	Cost	Price (Excl. Tax)	Qty
Affirm Water Bottle SKU: 24-UG06	\$7.00	\$7.00 Tier Pricing 10 for \$5.00 <input type="text" value="3.00"/>	<input type="text" value="10"/>
<b>Total 1 product(s)</b>	<b>Subtotal:</b>		<b>\$30.00</b>

Additional Discount (%)

Additional Surcharge (%)

View the information about a customer and easily evaluate when the account was created and how much has the customer spent during that time.

Hit the **Approve** button if the quote terms are satisfactory for you. You can also *Edit* the quote if needed.

# Edit Quote

← Back

Save Quote

## Quote & Account Information

### Quote # 100000024

Quote Date	Sep 5, 2019, 1:14:04 PM
Status	Approved
Expiry Date	Mon, 16 Sep 20
Reminder Date	Wed, 11 Sep 20
Created From	Main Website Main Website Store Default Store View

### Account Information [Edit Customer](#)

Customer Name	Veronica Costello
Email	roni_cost@example.com
Customer Group	General
Account Created	Mar 11, 2018, 4:24:23 PM
Orders Total	\$76.03

## Quote Items

Add Products

Product	Cost	Price (Excl. Tax)	Qty	Subtotal	Row Subtotal	Action
Maya Tunic SKU: WT07-S-Yellow <input type="button" value="Configure"/>	\$29.00	\$29.00 <input type="text" value="21.85"/>	<input type="text" value="1"/>	Excl. Tax: \$21.85 Incl. Tax: \$23.65	Excl. Tax: \$21.85 Incl. Tax: \$23.65	Please select
Nora Practice Tank SKU: WT03-M-Purple <input type="button" value="Configure"/>	\$39.00	\$39.00 <input type="text" value="28.50"/>	<input type="text" value="1"/>	Excl. Tax: \$28.50 Incl. Tax: \$30.85	Excl. Tax: \$28.50 Incl. Tax: \$30.85	Please select
<b>Total 2 product(s)</b>	<b>Subtotal:</b>		<b>\$50.35</b>	<b>\$50.35</b>		

Applied discount: 5%

Remove discount

Additional Discount (%)

Additional Surcharge (%)

Update Items and Quantities

## Quote Total

### Remarks for this Quote

#### Remarks

Hi Veronica, we can offer you a 5% discount.

### Quote Totals

Subtotal	\$50.35
Shipping & Handling	\$0.00
Tax	\$4.15
<b>Grand Total</b>	<b>\$54.50</b>

Note, that you can set the **Expiry** and **Reminder** date only after the quote was **Approved**. Other options can be edited either before you approve the quote or after that.

Edit products' **Price** and **Quantity** in the appropriate fields, set **Expiry** and **Reminder** date, leave **Remarks**.

Apply **Additional Discount/Surcharge** to the quote. Insert a percent number of discount/surcharge and it will be applied to the whole quote.

If you don't want to offer a special price for some particular product, remove it in one click via **Action** dropdown menu.

To edit products' size and color, press the **Configure** button.

### Configure Product ✕

#### Associated Products

Size

Color

Quantity

With the extension you are also able to add products to your customers' quotes. Click **Add Products**.

Choose the products to add. The configuration field where you can specify the size, color and quantity will be displayed automatically.

### Please select products

**Add Selected Product(s) to Quote**

**Search** [Reset Filter](#) 2045 records found

20  per page  1 of 103


ID	Product	SKU	Price	Select	Quantity
<input type="text"/>	<input type="text"/>	<input type="text"/>	From <input type="text"/> To <input type="text"/>	Any <input type="button" value="v"/>	
2046	<a href="#">Configure</a> Set of Sprite Yoga Straps	24-WG085_Group		<input type="checkbox"/>	<input type="text"/>
2045	<a href="#">Configure</a> Erika Running Short	WSH12	45.00	<input checked="" type="checkbox"/>	<input type="text" value="3"/>
2044	Erika Running Short-32-Red	WSH12-32-Red	\$45.00	<input type="checkbox"/>	<input type="text"/>

Click **Add Selected Product(s) to Quote**.

Check in advance on a **Product Page** that added items have **Inventory Source** specified for selected store view. If Inventory Source is not specified, the product cannot be displayed at the storefront, and it will also be impossible to create a quote both as customer and admin.

Click **Update Items and Quantities** to preview all the products and the subtotal of the quote. Provide a **Note** for the Quote to give a customer important or additional information about your offer.

In addition to this, it is possible to set custom shipping addresses, methods and custom fees right from the editing page. To do this, tick the Configure Shipping hitbox.

[Configure Shipping](#) 

### Quote Total

### Remarks for this Quote

Remarks

In the **Address Information** tab you can select one of the existing billing or shipping addresses or create new ones. Also, edit any customer info if needed.

## Address Information

### Billing Address

Select from existing customer addresses:

▼  
**Add New Address**  
Veronica Costello, 6146 Honey Bluff Parkway, Calder, Michigan 49628-7978, United States

\* First Name

Middle Name/Initial

### Shipping Address

Same As Billing Address

Select from existing customer addresses:

▼  
**Add New Address**  
Veronica Costello, 6146 Honey Bluff Parkway, Calder, Michigan 49628-7978, United States

Name Prefix

\* First Name

Middle Name/Initial

Proceed to the **Shipping Information** section.

## Shipping Information

### Shipping Method \*

**Flat Rate**

Fixed - \$10.00

**Best Way**

Table Rate - \$10.00

**Custom**

Custom Fee - \$

Chosen Shipping Address and Method are allowed to be modified on checkout

Here you can select one of the preconfigured shipping methods or set a custom fee for delivery. Allow or disallow chosen Shipping Address and Method to be modified on checkout.

**Save Quote** and then **Approve** it.

After the approval, you are able to **convert a quote to order** without leaving the page.

#1000000012 demouser ▾

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[← Back](#)   [Cancel / Close](#)   [Convert To Order](#)   [Download PDF](#)   [Edit](#)

✔ You approved the quote.

**QUOTE VIEW**

---

Information

### Quote & Account Information

---

#### Quote # 1000000012

Quote Date	Mar 11, 2019, 11:42:35 AM
Status	Approved
Created From	Main Website Main Website Store Default Store View
Placed from IP	213.184.226.82


#### Account Information

[Edit Customer](#)

Customer Name	Veronica Costello
Email	<a href="mailto:roni_cost@example.com">roni_cost@example.com</a>
Customer Group	General

### Step 3. Quote Confirmation

Customers can easily track and manage quote requests in their accounts. In **My Quotes** tab the **ID**, **Date**, **Quote Total**, **Status** and **Expiry Date** for each quote will be displayed.

 amasty

# My Quotes

Quote #	Date	Quote Total	Status	Expiry Date	Action
1000000022	8/28/19	\$64.95	Approved	Sep 7, 2019	<a href="#">View</a>   <a href="#">Move to Cart</a>
1000000016	4/15/19	\$43.30	Expired	Apr 23, 2019	<a href="#">View</a>
1000000012	4/15/19	\$81.19	Expired	Apr 25, 2019	<a href="#">View</a>
1000000011	3/4/19	\$81.19	Expired	Apr 28, 2019	<a href="#">View</a>
1000000005	3/4/19	\$21.65	Canceled	N/A	<a href="#">View</a>
1000000004	3/4/19	\$64.95	Canceled	N/A	<a href="#">View</a>

6 Item(s)

Show  per page

If a quote is approved by the admin, the customer can **Move to Cart** all the products right from the grid.

Customers can also **View Quotes** details and **Download PDF** version of quotes.

# Quote # 1000000028

EXPIRED

Creation Date: September 5, 2019

Expiry Date: September 15, 2019 at 1:42:35 PM UTC

[Download PDF](#)

Product Name	SKU	Original Price	Requested Price	Approved Price	Qty	Discount Amount	Subtotal	
Bolo Sport Watch	24-WG01	\$49.00	\$38.00	\$41.16	1	\$7.84 (16.00%)	\$41.16	
Cruise Dual Analog Watch	24-MG05	\$55.00	\$47.00	\$48.02	1	\$6.98 (12.69%)	\$48.02	
							Subtotal	\$89.18
							Shipping & Handling	\$0.00
							Tax	\$7.36
							Grand Total	\$96.54

## Remarks

**Administrator Remarks:**

Additional Discount in amount of 2% was applied.

If the suggested terms of the quote are not acceptable, the customer can **Cancel** the request.

In case the offered prices are satisfactory, the customer is able to **Move to Shopping Cart** or directly **Move to Checkout** all products with the custom prices in one click.

Customers are not allowed to edit the quotes with *Approved* status.

You will see the *Complete* or *Canceled* Status on the grid in your admin panel.

## Creating a Quote by Admin

Store admin can create a quote from the **Quotes** grid, using the **Create New Quote** button.

# Quotes

Create New Quote

Filters

Default View

Columns

Export

Actions

12 records found

20 per page

<

1 of 1

>

<input type="checkbox"/>	ID	Purchase Point	Purchase Date ↑	Status	Grand Total	Action	Expiry Date
<input type="checkbox"/>	1000000035	Main Website Main Website Store Default Store View	Apr 1, 2020 9:28:20 AM	Pending	\$30.00	<a href="#">View</a>	N/A
<input type="checkbox"/>	1000000028	Main Website Main Website Store Default Store View	Sep 5, 2019 1:41:32 PM	Approved	\$96.54	<a href="#">View</a>	2019-09-15 13:42:35

Choose a customer from the grid or create a new one using the button.

## Edit Quote #0000000055

← Back

Please select a customer

Create New Customer

Search

Reset Filter

5 records found

20 per page

<

1 of 1

>

ID ↑	Name	Email	Phone	ZIP/Post Code	Country	State/Province	Signed-up Point
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	All Countries	<input type="text"/>	<input type="text"/>
3	Anna White	anna@example.com	(5895) 2369-5689	2365-8965	United States	New York	Default Store View
2	John Harris	john@example.com	(2565) 2563-5698	2365-5698	United Kingdom		Default Store View
1	Veronica Costello	roni_cost@example.com	(555) 229- 3326	49628- 7978	United States	Michigan	Default Store View

Select the necessary store for order to create.

## Edit Quote #0000000057

Cancel

Please select a store

Main Website 

Main Website Store

Main Website Store  Default Store View

French Website

French Store

French Store  French Store View

It's possible to create quote in admin panel for a customer from any store view (even if he/she doesn't belong to the corresponding website). The customer will be duplicated to the necessary store.

# Edit Quote #

 demouser ▾

Cancel

Submit Quote

Quote Currency:

US Dollar ▾

## Items Quoted

Add Products

Product	Price	Qty	Subtotal	Row Subtotal	Action
---------	-------	-----	----------	--------------	--------

No ordered items

## Account Information

\* Group

General ▾

\* Email

eva\_green@example.com

\* Tax/VAT Number

5589847

Name Prefix

\* First Name

Eva

On this step you can add product to quote, adjust prices add edit the necessary customer info.

Also, admin users can create quote themselves right from the orders grid.

To do this, go to **Admin Panel** → **Sales** → **Orders**.


Choose the order and click **Select** button in the *Actions* column. **Clone as Quote** option will appear.

# Orders


 demouser ▾

[Create New Order](#)



 Filters

 Default View ▾

 Columns ▾

 Export ▾

Actions ▾

3 records found

20 ▾ per page

<

1

of 1

>

<input type="checkbox"/>	ID	Purchase Point	Purchase Date ↑	Grand Total (Base)	Grand Total (Purchased)	Status	Action	Signifyd Guarantee Decision
<input type="checkbox"/>	000000003	Main Website Main Website Store Default Store View	Mar 4, 2019 11:07:31 AM	\$30.00	\$30.00	Pending	Select ▾ <div style="border: 1px solid #ccc; padding: 2px; width: fit-content;"><a href="#">View</a> <a href="#">Clone as Quote</a></div>	
<input type="checkbox"/>	000000002	Main Website Main Website Store Default Store View	Mar 11, 2018 4:24:43 PM	\$39.64	\$39.64	Closed	Select ▾	

Now it is possible to edit the price and the quantity.

## Items Quoted

Add Products

Product	Price (Excl. Tax)	Qty	Subtotal	Row Subtotal	Action
Iris Workout Top SKU: W503-XS-Red <input type="checkbox"/> Custom Price* <input type="text" value="27.55"/> <input type="button" value="Configure"/>	\$29.00	<input type="text" value="1"/>	\$27.55	\$27.55	Please select <input type="button" value="v"/>
Total 1 product(s)		Subtotal:	\$27.55	\$27.55	


\* - Enter custom price excluding tax

Applied discount: 5%


Additional Discount (%)  Additional Surcharge (%)

## Hide Price


Magento 2 Request a Quote extension is preintegrated with **Hide Price** package. It provides you with the capability to use all Hide Price benefits according to your needs: disable ordering, hide prices for particular products or customer groups, etc. which will bring even more involving of potential buyers into pricing negotiations.

1 


**Desite Fitness Tee**  
\$24.00

2 

**Messenger Bag**

3 

**Oslo Trek Hoodie**

4 

**Aim Analog Watch**  
\$40.00

## General Settings

To configure Hide Price settings go to **Stores → Configuration → Amasty Extensions → Hide Price**:

To run the module on Magento 2.3, Zend DOM package should be installed. Please, run the following command in the SSH: `composer require zendframework/zend-dom`

### General Settings

**Enable Extension** [store view]

Choose 'Yes' to hide the price for the selected product categories and customer groups

**Hide Price for Selected Group(s)** [store view]

- NONE
- NOT LOGGED IN
- General
- Wholesale
- Retailer

Product price will be hidden for the selected customer groups only

**Hide Price for Selected Category(s)** [store view]

- NONE
- Root Catalog
- Default Category
- Gear
- Bags
- Fitness Equipment
- Watches
- Collections
- New Luma Yoga Collection
- Training

**Enable Extension** - set the option to 'Yes' to activate the extension.

**Hide Price for Selected Group(s)** - select a customer group (groups) for which the prices in selected above categories will be hidden.

**Hide Price for Selected Category(s)** - select a category (categories) in which all product prices will be hidden.

**IMPORTANT:** If you don't want to hide prices for whole categories you can easily hide them for

specific products. Simply open the necessary product page here **Products** → **Catalog** and disable price visibility. Here you can also specify a customer group for which the product price won't be available.

### Hide Price

Display Price Mode  
[store view]

Hide	▲
-- Default Config --	
Hide	
Show	

Use Current Price Mode By Customer Group  
[store view]

NONE
NOT LOGGED IN
General
Wholesale
Retailer

If you hide prices for whole product categories and customer groups, you can exclude specific products and customers from the price display limitation.

<b>Do not Apply to Product ID's</b> <small>[store view]</small>	<input type="text" value="12"/>	Specify comma separated product id's to show the price for. This setting has the maximum priority
<b>Do not Apply to Customer ID's</b> <small>[store view]</small>	<input type="text" value="1134, 1116"/>	Specify comma separated customer id's to show price for. This setting has the maximum priority
<b>Email Sender for Admin Reply Email</b> <small>[store view]</small>	<input type="text" value="General Contact"/> ▼	
<b>Email Template for Admin Reply Email</b> <small>[store view]</small>	<input type="text" value="Amasty Hide Price Auto Reply (Defa"/> ▼	Email template chosen based on theme fallback when "Default" option is selected

**Don't Apply to Product ID's** - specify product ID's to which price display limitations won't be applied.

**Don't Apply to Customer ID's** - specify customer ID's to which price display limitations won't be applied.

The following email settings will be used when a store administrator replies to a customer quote request via email.

**Email Sender for Admin Reply** - select a sender contact for store admin notifications.

**Email Template for Admin Reply** - select an email template for admin notifications.

### Hide Price Options

Hide Price <small>[store view]</small>	Yes
Hide "Add to Cart" <small>[store view]</small>	Yes
Hide "Add to Wishlist" <small>[store view]</small>	Yes
Hide "Add to Compare" <small>[store view]</small>	Yes

Hide 'Add to Cart' or replace it with the custom button, e.g. 'Sign up' or 'Get a Quote'

Hide wishlist link when price is hidden

Hide compare link when price is hidden

If the price is configured to be hidden, the customer will not see this price in quote cart as well.

**Hide Price** - enable the option to hide prices for selected products or product categories.

**Hide Add to Cart** - set the option to 'Yes' to remove the "Add to Cart" button.

**Hide Add to Wishlist** - This setting lets you hide/display the "Add to Wishlist" option.

**Hide Add to Compare** - Enable/disable adding products to the comparison.

You can let shoppers add products to wishlists and compare even when their price is hidden.

### Frontend Options

## Frontend Options

**Hide Price Text**  
[store view]

Display the above text when price is hidden, e.g. 'Call for Price'

**Custom CSS Styles for Hide Price Link**  
[store view]

```
font-size: 16px;background: #eeeeee; display: inline-block;border: 1px solid #cccccc; color: #333333;cursor: pointer;display: inline-block;padding: 7px 15px;font-size: 1.4rem; line-height: 1.6rem;
```

Customize the CSS Styles for the Hide Price Link

**Upload Image**  
[store view]

 No file chosen

Show the uploaded image instead of price

**Link Url**  
[store view]

Use text 'AmastyHidePricePopup' for opening Ajax Popup with a 'Get a Quote' form. Insert the page URL to redirect customers to any page you need

**Hide Price Text** - specify a custom text that will be used for a custom button instead of the "Add to Cart" option.

**Custom CSS Styles for "Hide Price Link"** - you can customize the button display (which is used instead of "Add to Cart").

**Upload an Image** - upload any image you need to show it instead of a price.

**Link URL** - by default we've already specified a "Get a Quote" form code here (once a customer clicks on a custom button the form will be shown), but you can insert any link you need to redirect customers to the necessary store page.

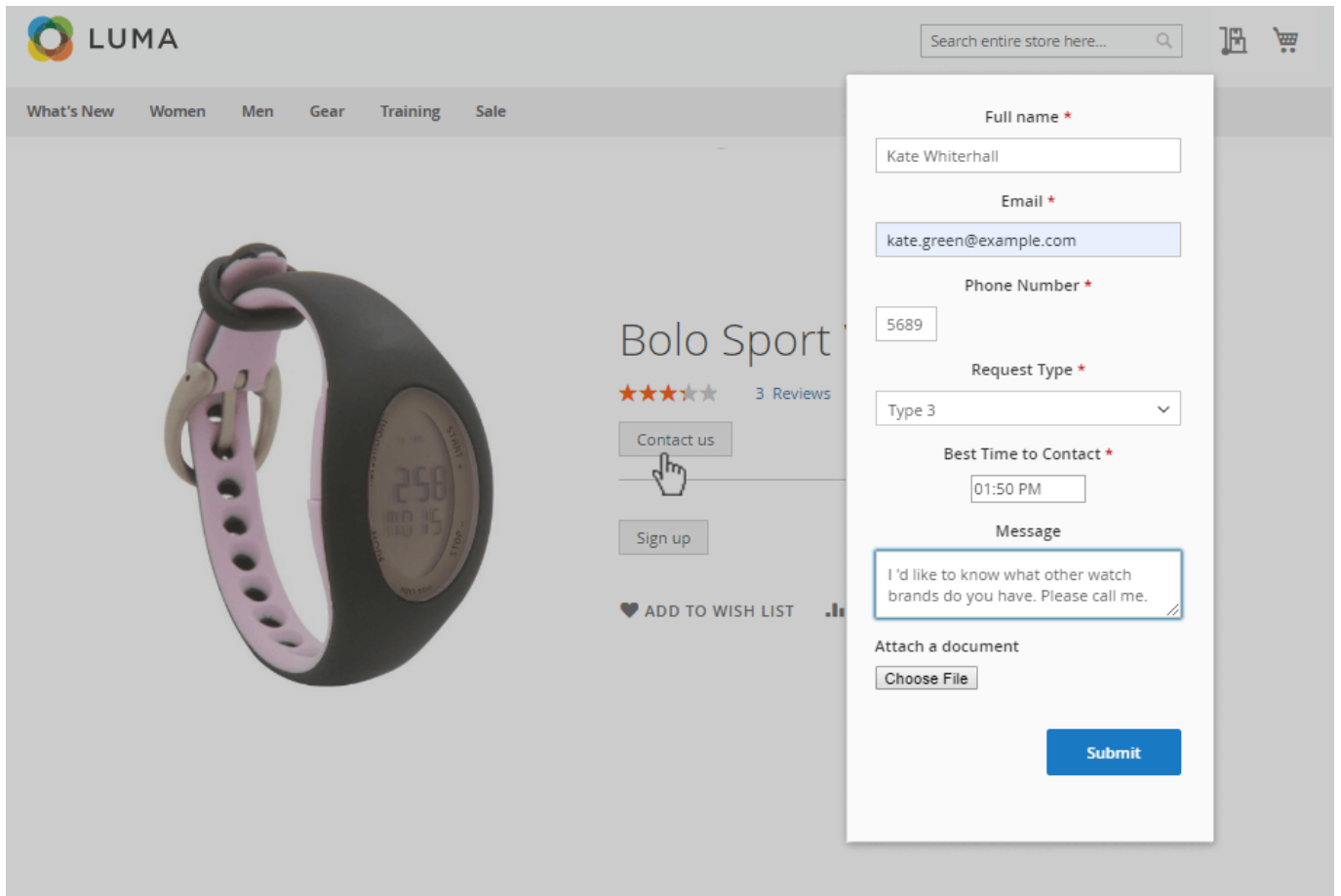
Below you'll see the example of a 'Hide Price' popup.

The screenshot shows a modal window titled "Get a Quote for Driven Backpack" with a close button (X) in the top right corner. The form contains the following fields:

- Customer Name \***: Input field containing "Veronica Costello".
- Customer Email \***: Input field containing "roni\_cost@example.com".
- Phone Number \***: Input field containing "1 419-422-0787".
- Comment**: Text area containing "Hi, could you please tell me Driven Backpack price? I'd buy 5 of them if the price is not higher than \$65." with a green checkmark icon in the bottom right corner.

A blue "Submit" button is located at the bottom left of the form.

Add **Magento 2 Custom Form** to create custom quote request forms of various types, specifying additional information you need to generate a special price offering. Use a handy constructor to generate multiple forms in no time and customize each form to meet your needs.



## Admin Email Notifications

The module lets you notify admin users about new 'Get a Quote' requests via email.

### Admin Email Notifications

**Send Email to**   
[store view]  
Leave Empty to Disable Notifications

**Email Sender**   
[store view]

**Email Template**   
[store view]  
Email template chosen based on theme fallback when "Default" option is selected

**Send Email to** - specify an email address to which a new quote request notification will be sent. Leave Empty to Disable Notifications.

**Email Sender** - select an email sender contact.

**Email Template** - select an email template that will be used for admin user notifications.

### Auto Reply Email Options

Use auto replies to quote requests to inform customers that their request is delivered and is being processed.

#### Auto Reply Email Options

<b>Enable</b> <small>[store view]</small>	Yes	▼
<b>Email Sender</b> <small>[store view]</small>	General Contact	▼
<b>Email Template</b> <small>[store view]</small>	Amasty Hide Price Auto Reply (Defal	▼

Email template chosen based on theme fallback when "Default" option is selected

**Enable** - set to 'Yes' to activate the Auto reply option.

**Email Sender** - select an email contact from which auto replies will be sent.

**Email Template** - select an email template that will be used for auto replies.

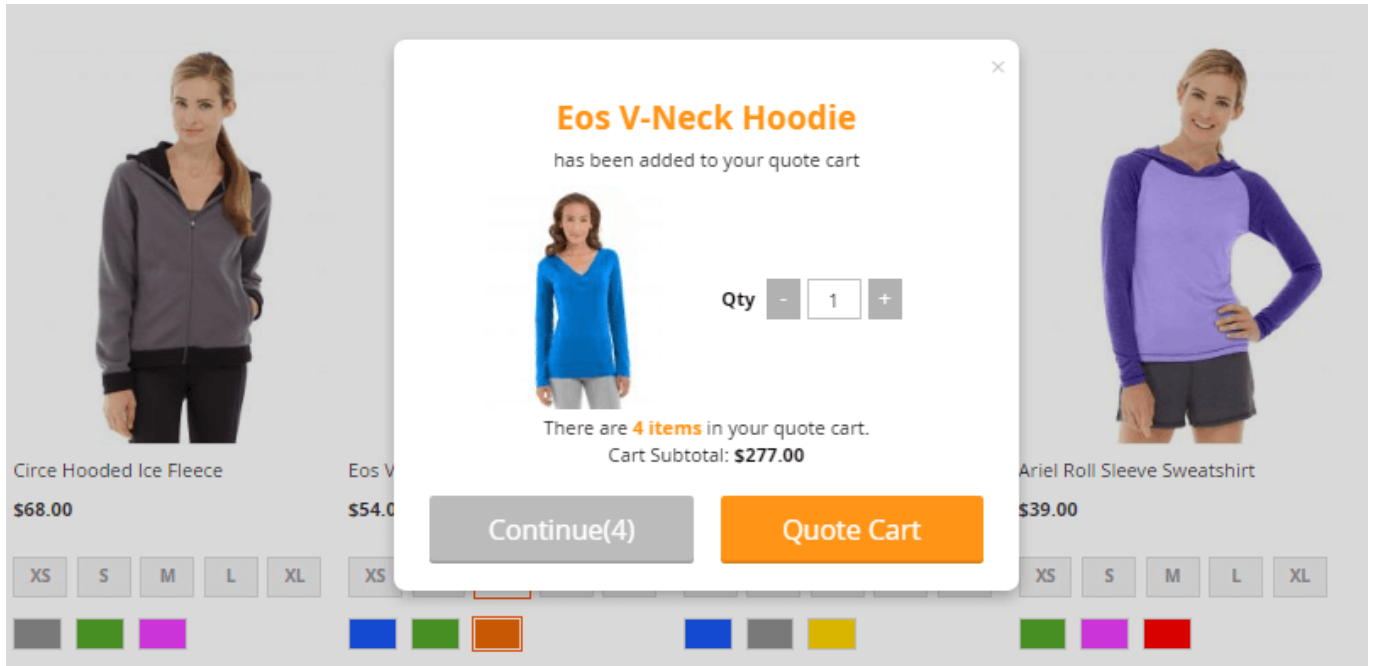
Please view [Magento 2 Hide Price User Guide](#) for more options

## Compatibility with AJAX Shopping Cart

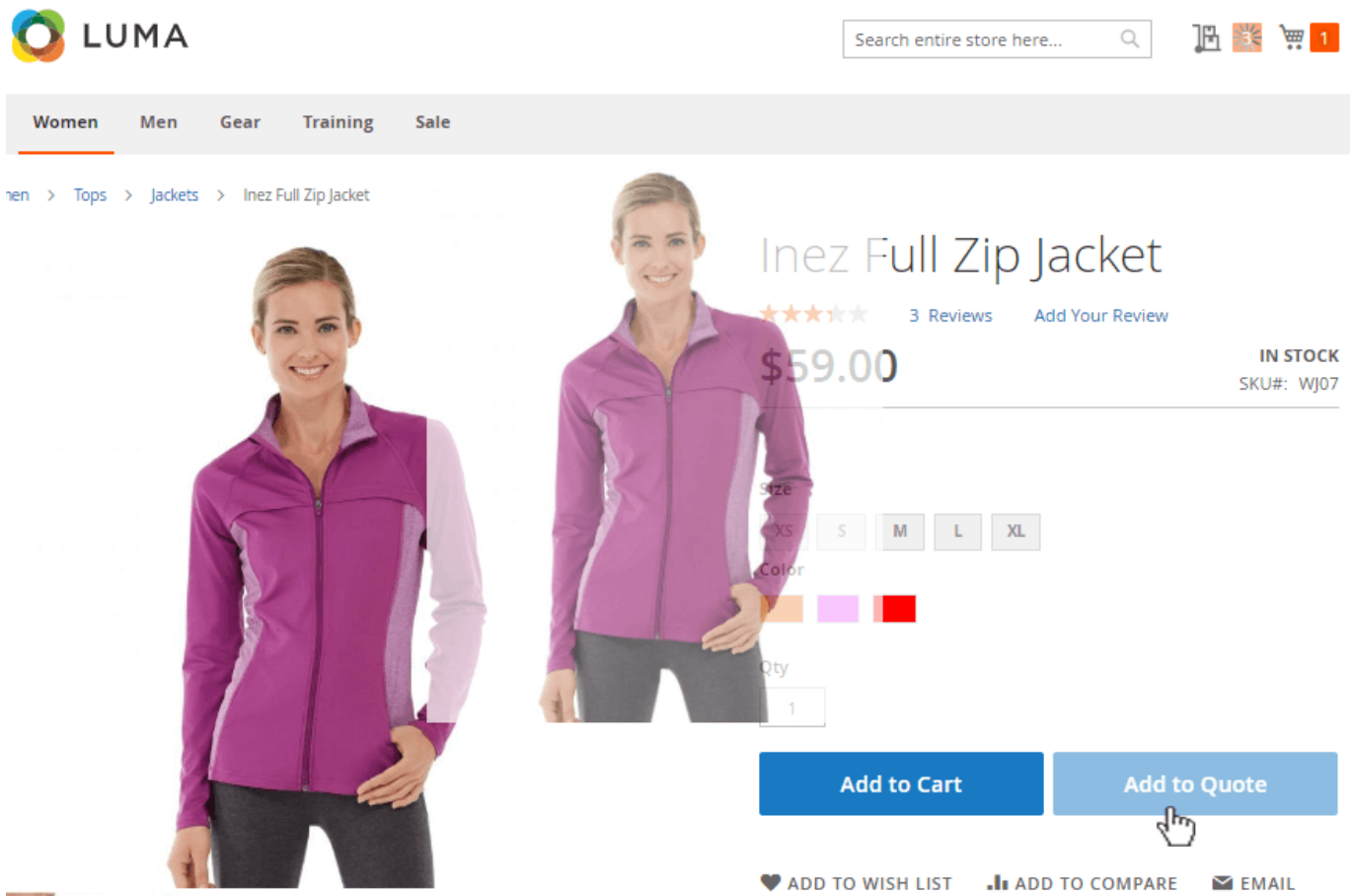
The extension is fully compatible with AJAX Shopping Cart.

Employ **Magento 2 AJAX Shopping Cart** to add more advanced options to your Request a Quote extension. For example:

- Show confirmation pop-up with the product info



- Enable flying effect for add to the quote process to engage customers even more



- Let customers specify the options of the simple products right in a dialog window

Please choose the options for your item

Proteus Fitness Jackshirt  
\$45.00

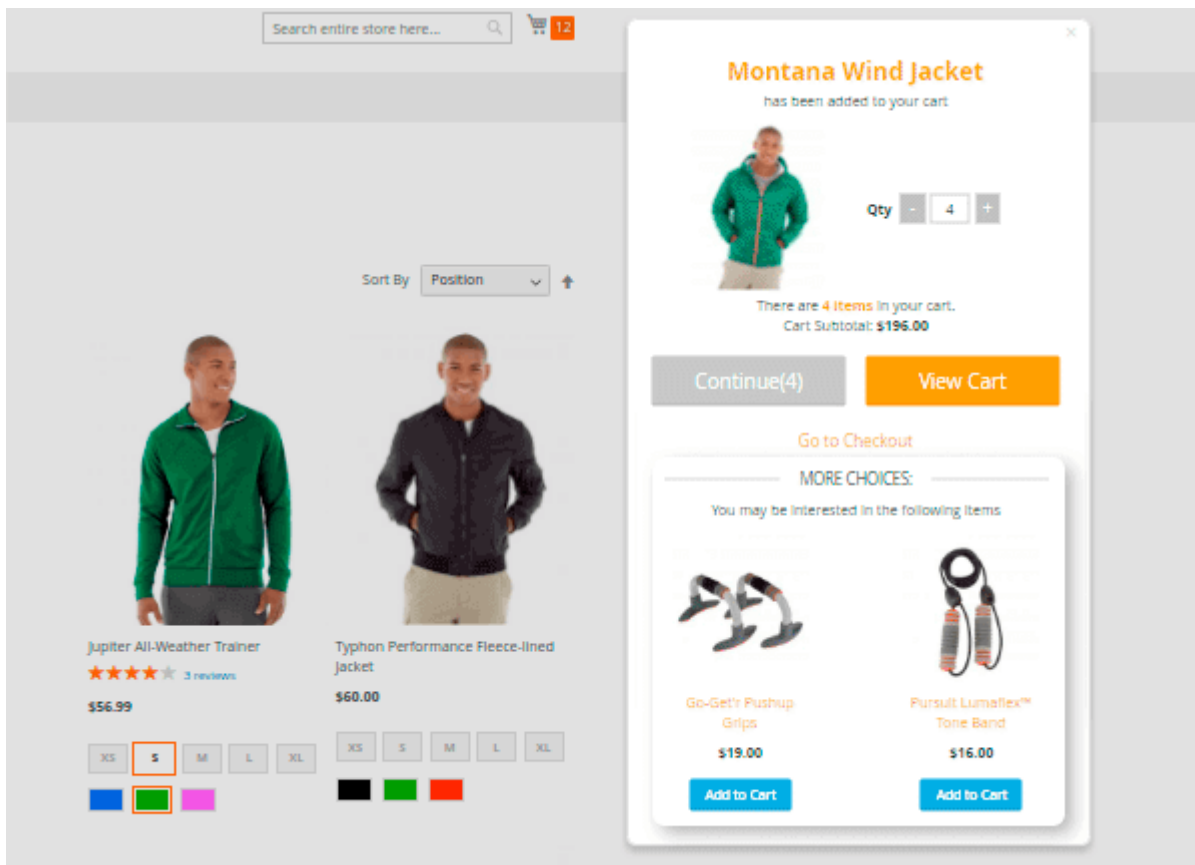
Size  
XS S M L XL

Color  
Black Blue Orange

Qty  
1

Continue shopping Add to quote

- Show related products or cross-sells in the confirmation pop-up



## Cron Tasks List

Magento 2 Request a Quote extension is preintegrated with Cron Tasks List to provide store owners with an opportunity to track and manage all cron tasks running in the website background.

To view all scheduled and executed cron tasks, go to **System → Cron Tasks List**

Run all cron tasks and generate their schedule by clicking the 'Run Cron' button. Also you can delete separate tasks in bulk, apply filtering and sorting options when it is needed.

## Cron Tasks List

Run Cron

Last Cron Activity: 20 seconds ago

Filters Default View Columns

Actions 652 records found 20 per page 1 of 33

ID	Job Code	Status	Created At	Scheduled At	Executed At	Finished At
1038	sales_grid_order_shipment	SUCCESS	Mar 18, 2019 5:47:11 AM	Mar 18, 2019 5:47:00 AM	Mar 18, 2019 5:47:20 AM	Mar 18, 2019 5:47:20 AM
1058	sales_grid_creditmemo_async	SUCCESS	Mar 18, 2019 5:47:11 AM	Mar 18, 2019 5:47:00 AM	Mar 18, 2019 5:47:20 AM	Mar 18, 2019 5:47:20 AM
1078	sales_send_order_emails	SUCCESS	Mar 18, 2019 5:47:11 AM	Mar 18, 2019 5:47:00 AM	Mar 18, 2019 5:47:20 AM	Mar 18, 2019 5:47:20 AM
1098	sales_order_invoice_emails	SUCCESS	Mar 18, 2019 5:47:11 AM	Mar 18, 2019 5:47:00 AM	Mar 18, 2019 5:47:20 AM	Mar 18, 2019 5:47:20 AM
1118	sales_send_order_shipment	SUCCESS	Mar 18, 2019 5:47:11 AM	Mar 18, 2019 5:47:00 AM	Mar 18, 2019 5:47:20 AM	Mar 18, 2019 5:47:20 AM
1196	indexer_reindex_all_invalid	SUCCESS	Mar 18, 2019 5:47:13 AM	Mar 18, 2019 5:47:00 AM	Mar 18, 2019 5:47:21 AM	Mar 18, 2019 5:47:21 AM
1200	indexer_update_all_views	MISSED	Mar 18, 2019 5:47:13 AM	Mar 18, 2019 5:47:00 AM	Mar 18, 2019 5:47:21 AM	Mar 18, 2019 5:47:21 AM
1018	sales_grid_order_invoice_async	SUCCESS	Mar 18, 2019 5:47:11 AM	Mar 18, 2019 5:47:00 AM	Mar 18, 2019 5:47:20 AM	Mar 18, 2019 5:47:20 AM
1024	sales_grid_order_invoice_async	PENDING	Mar 18, 2019 5:47:11 AM	Mar 18, 2019 5:53:00 AM		
1025	sales_grid_order_invoice_async	PENDING	Mar 18, 2019 5:47:11 AM	Mar 18, 2019 5:54:00 AM		

## API Methods

API methods allow admin to connect quote requests and proposals to and from other systems such as ERP and CRM.

The following methods are available:

**amastyRequestQuoteRemarkServiceV1** Interface RemarkServiceInterface

PUT /V1/amasty\_quote/updateRemark

**amastyRequestQuoteQuoteRepositoryV1**

PUT /V1/amasty\_quote/approve/{quoteId}

PUT /V1/amasty\_quote/expire/{quoteId}

GET /V1/amasty\_quote/search

PUT /V1/amasty\_quote/quote/note/customer:quoteId

PUT /V1/amasty\_quote/quote/note/admin:quoteId

**amastyRequestQuoteQuoteItemRepositoryV1** Interface QuoteItemRepositoryInterface

PUT /V1/amasty\_quote/quote\_item/note/customer:quoteId

PUT /V1/amasty\_quote/quote\_item/note/admin:quoteId

Using API methods, you can **Get Quote, Approve Quote, Expire Quote, Add Quote Comment** and **Add Quote Item Note**.

**PUT** request - to update a particular quote;

**GET** request - to retrieve data from a server.

Find out how to install the Request a Quote for Magento 2 via [Composer](#).

From: <https://stg.amasty.net/docs/> - **Amasty Extensions FAQ**

Permanent link: [https://stg.amasty.net/docs/doku.php?id=magento\\_2:request\\_a\\_quote](https://stg.amasty.net/docs/doku.php?id=magento_2:request_a_quote)

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