

Supported Magento versions: 2.1, 2.2, 2.3

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INSTALLATION INSTRUCTIONS

1. Create the Directory structure `app/code/Purpletree/RequestaQuote/`.
 - This means you have to first move to `app/code/` directory.
 - Now create directory `Purpletree` from inside `app/code/` directory.
 - Now move to `app/code/Purpletree`, and create a directory named `RequestaQuote`.
2. Unpack the extension zip file inside the newly created `app/code/Purpletree/RequestaQuote/` directory.

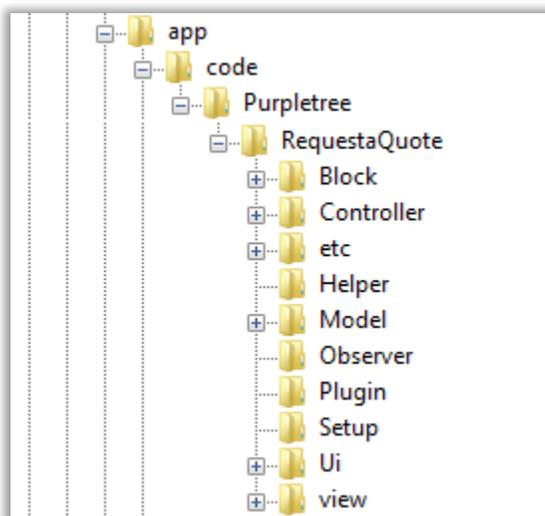
Folder Structure of extension in Magento 2 root is following:

`<Magento Root>/app/code/Purpletree/RequestaQuote/controller`

And

`<Magento Root>/app/code/Purpletree/RequestaQuote/block`

Directories.



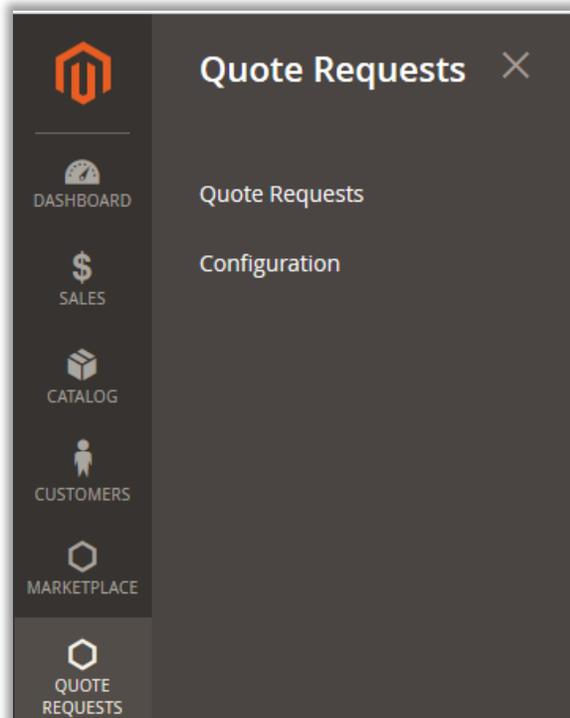
3. From shell/command prompt, run following commands on Magento root directory:
 - php bin/magento setup:upgrade
 - php bin/magento setup:static-content:deploy
 - php bin/magento indexer:reindex
4. Make sure Magento Cron script is set and running fine. This is very important.

Instructions: <https://devdocs.magento.com/guides/v2.0/config-guide/cli/config-cli-subcommands-cron.html>

CONFIGURATION

On successful installation, a new Menu will appear in Magento Admin's left panel with name of **Quote Requests**. It will have following sub menus

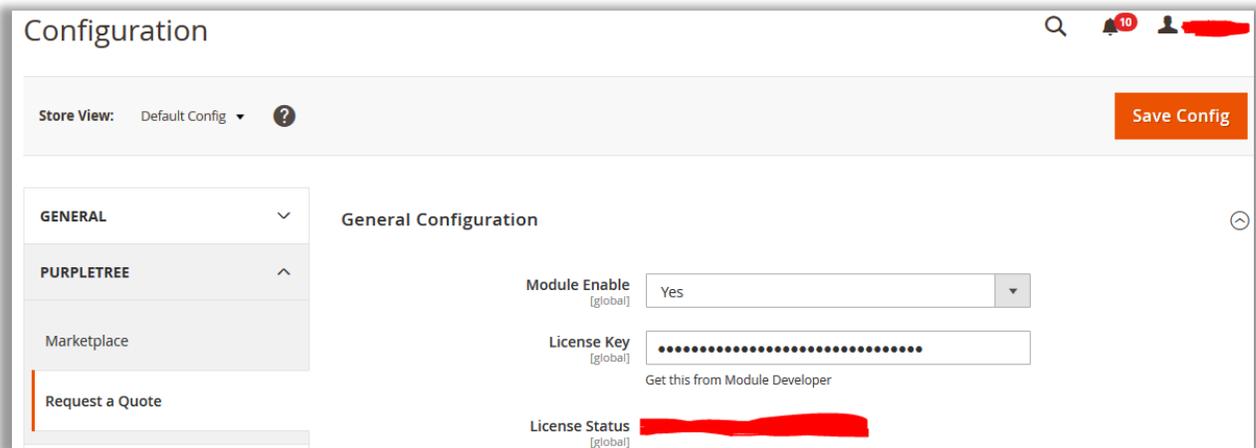
- Quote Requests
 - Quote Requests
 - Quote Requests
 - Configuration



To Configure and Enable the Extension

- Go to Quote Requests > Quote Requests > **Configuration**.
- In “**General Configuration**”, Set “Module Enable” to Yes.
- Now Enter **License key** you get with this extension in License key field. **(required field)** If you haven’t received license key, please contact our support team.
- License Status – Default it is set “To be validated”. It will get validated once you enter Valid License key.

Note: Valid License Key is required to save any configuration changes. Please contact our helpdesk if you have not received the license key.



Note - After changing options make sure you refresh your Magento cache.

Email Notifications

- **Admin Email Address** — Select Email Address on which and from which Admin would send and receive Email regarding **Quote**.
- **E-mail Notification to Admin** – Select “**Yes**” to receive Notification regarding Quote to Admin if Customer Raise any new Request or update any Quote Request.
- **E-mail Notification to Customer** – Select “**Yes**” to receive Notification regarding Quote to Customer if Customer Raise any new Request or **Admin/Seller** updates any Quote Request.

Email Notifications ⌵

Admin Email Address [global] ▼
Request a Quote email for communication

E-mail Notification to Admin [store view] ▼

E-mail Notification to Customer [store view] ▼

Managing Links

- **Product Link Button Label** — Enter the Button title name which will be shown on Product Page for Request. Default is set to **Request a Quote**.
- **Enable Header Link** – Set it to **“Yes”** to add the link for **Generic form** to Header. This might not come if any custom theme is used.
- **Header Link Label** – Enter the title for Header Link. This Title will be visible only when **“Enable Header Link”** is set to **Yes**.
- **Enable Footer Link** – Set it to **“Yes”** to add the link for **Generic form to footer**. This might not come if any custom theme is used.
- **Footer Link Label** – Enter the title for Footer Link. This Title will be visible only when **“Enable Footer Link”** is set to **Yes**.

Manage Links ⌵

Product Link button Label [store view]
Label/Title for Product Page link.

Enable Header Link [store view] ▼
Enable/Disable header link

Header Link Label [store view]
Label/Title for header link.

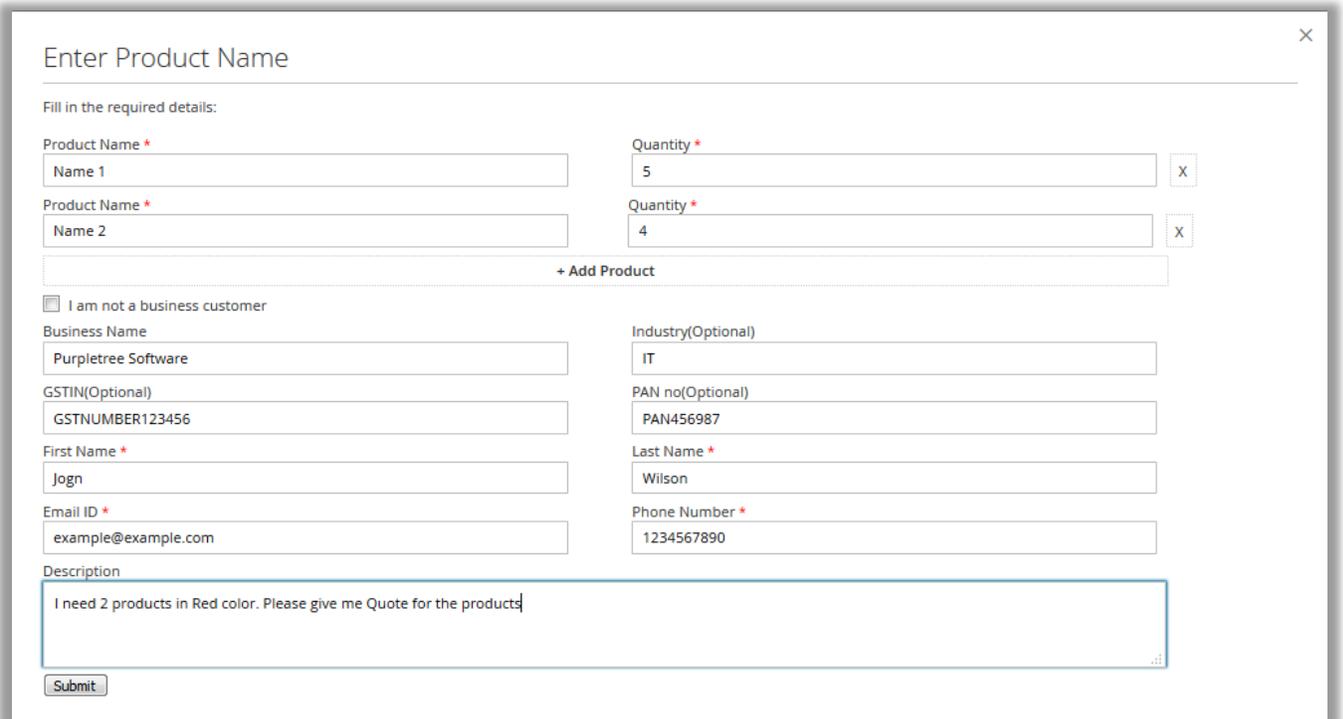
Enable Footer Link [store view] ▼
Enable/Disable Footer link

Footer Link Label [store view]
Label/Title for footer link.

CUSTOMER/GUEST OPTIONS

RAISE A REQUEST FROM GENERIC FORM

Any user who visits website can **Request a Quote** for any product from Generic form whose link is added on Header or Footer if Configured from Settings. If any user visits website and didn't find any product which they want to buy in Bulk, the user can contact the admin regarding the same with requirement from **Request a Quote** Form from Header or Foote



In the above form Fill in the required fields and your message in Description.

Product Name - Enter the product name for which user wants information. Enter any name, Admin can add product from admin panel if available.

Quantity – Enter Desired Quantity for the Product.

+ Add Product – Click this button to add multiple product requests in one go. User can enter as many Product requests from this form. All the Product Requests will be processed individually by admin.

I am not a business customer - If user is Business customer, then no need to check this box, keep this box unchecked and enter the following information regarding business, else if normal user then click on this Checkbox so that user don't have to enter Business Information.

Business Name – Enter Business name.

Industry – Enter the Industry for which your business is registered.

GSTIN – Enter GST Number if you have any in this field.

PAN no – Enter PAN card Number in this field if available.

First Name – Enter Customer First Name over her (This Filed will be auto filled if **Customer is already logged in**). However you can change this information even if logged in.

Last Name – Enter Customer Last Name over her (This Filed will be auto filled if **Customer is already logged in**). However you can change this information even if logged in.

Email ID – Enter Customer Email ID over her (This Filed will be auto filled if **Customer is already logged in**). You cannot change Email ID if already logged into the Website.

Make sure to enter valid email Address as this will be used in further communication if customer is not **Logged In**.

Phone Number - Enter Customer Last Name over her (This Filed will be auto filled if **Customer is already logged in**). However you can change this information even if logged in.

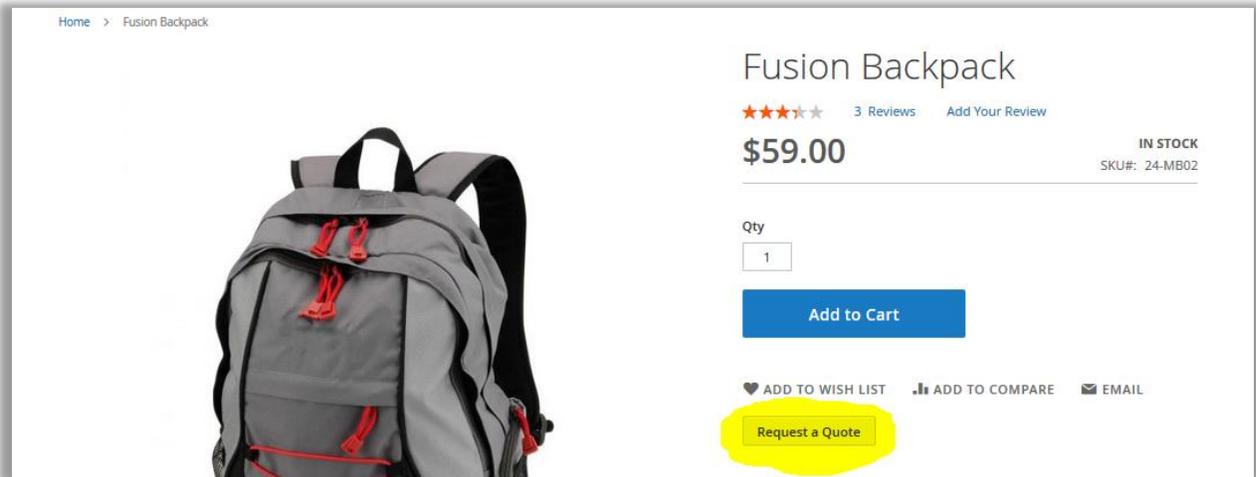
Description- Enter the Description over her in this filed so that admin would able to know the exact requirement of user. Make sure to explain all in detail in this field.

Click on **Submit** button to save the quote information and so that admin would be able to process it further.

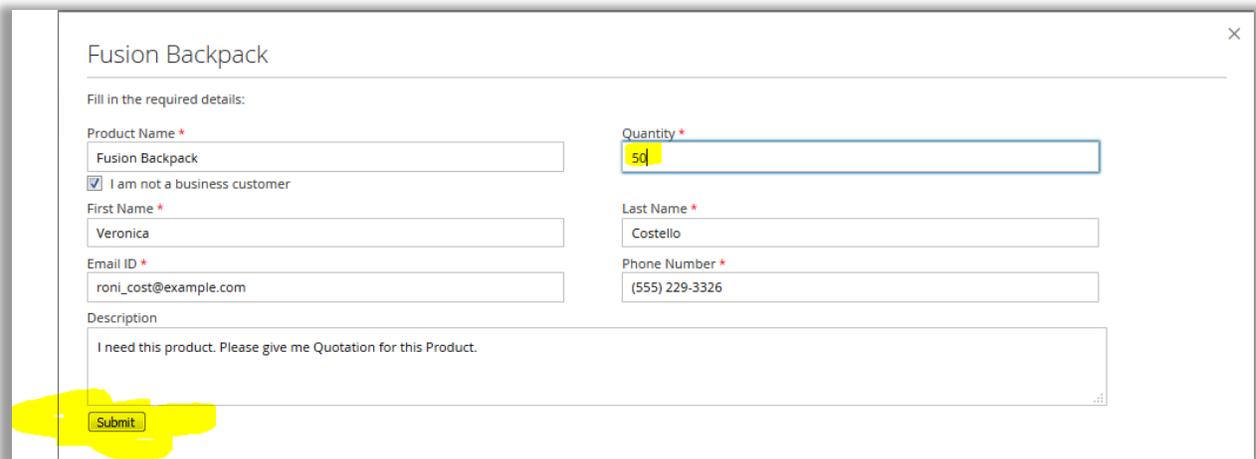
Admin and Customer/Guest will get **Email** regarding this Request if **Email Notification** is enabled from admin Configuration.

RAISE A REQUEST FROM PRODUCT PAGE

Any user can **Request a Quote for Product** from Product page also, there is a button with **Request a Quote** under **Add to cart**. Click on this button and Popup will open.



Enter Following Information in the Popup as you have filled in **Generic Form**. In here you just don't have to Enter Product Name, Else all the form is same means you can only Request for particular product only from this page.

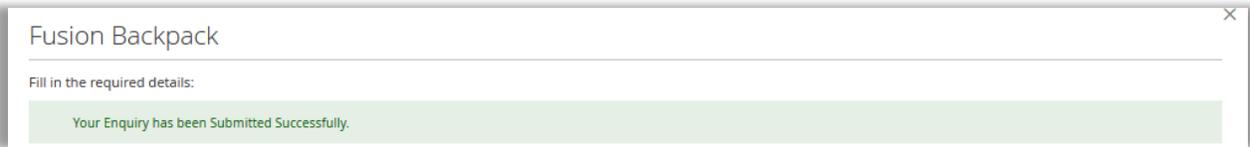


User cannot Change Product name in this form. They can just Enter Quantity for that product. For any Specific thing, user can enter it in Description.

Admin and Customer/Guest will get **Email** regarding this Request if **Email Notification** is enabled from admin Configuration.

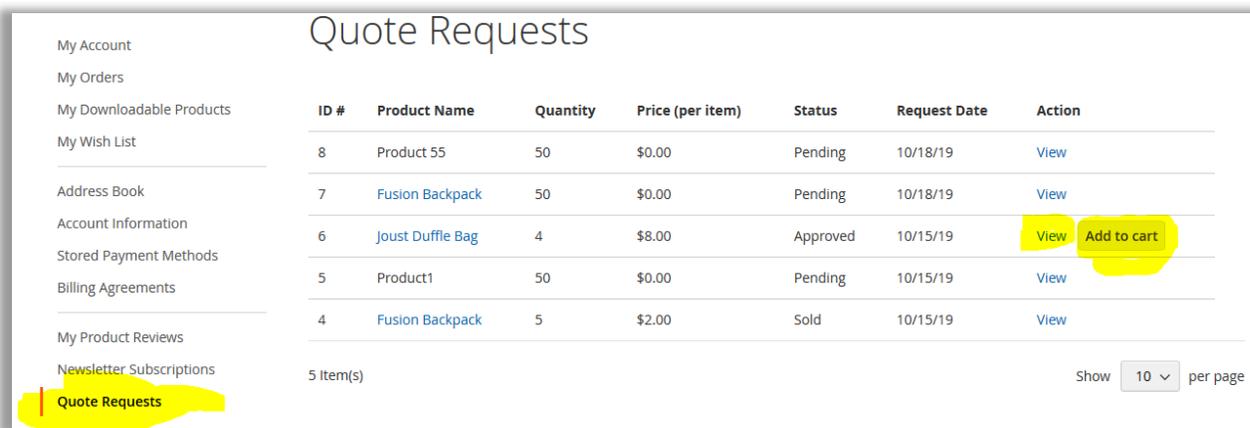
This Extension is also supported with Purpletree Marketplace for Magento 2. So if selected product is of Seller, then **Seller** would also get the Request Information in **Seller Panel** and **Email Notification** regarding the Quote.

On successfully Submitting the Request Success message will come.



QUOTE REQUESTS

If Customer is **logged in** and requested any Quote from **Generic** Form or from any **Product** page, then all the Request of the customer goes into Quote Request Menu under Customer Account, Click on the link Quote Request and customer would be able to see the list of Requests for Quotes.



ID #	Product Name	Quantity	Price (per item)	Status	Request Date	Action
8	Product 55	50	\$0.00	Pending	10/18/19	View
7	Fusion Backpack	50	\$0.00	Pending	10/18/19	View
6	Joust Duffle Bag	4	\$8.00	Approved	10/15/19	View Add to cart
5	Product1	50	\$0.00	Pending	10/15/19	View
4	Fusion Backpack	5	\$2.00	Sold	10/15/19	View

5 Item(s) Show per page

In the Above list customer can see the entire updated quote Information. In Product Name Column, if Product is already assigned by admin then customer can click on the Product link to view the product for which request is raised for Quote. **Quantity, Price, Status** can be changed by **admin** and **Seller** if Seller product for any quote at any point of time. **Price** in the column is per product only; if quantity is more than one then you can calculate the Total Cost accordingly.

If Any Quote **Status** is **approved** by admin, the Customer would able to see the **Add to Cart Button** along with **View** button. On Click of **Add to Cart** button, Product with approved Quantity and Price will be added in cart and customer can checkout from the website as Normal.

Once **Add to cart** button is clicked, then the Quote Request will be marked as **Sold** and User would not be able to Add the Product with Approved price to Cart, Unless **Admin** or **Seller** change the Quote Status to **Approved Again**. So please don't try to Edit the product in cart or Delete the product from cart after this point.

Note – Customer would not be able to Update Quantity for the Product for Approved price which is **Added to Cart** from this button. It will show Error on the Cart Page/Mini Cart, however you can delete the Product from cart.

To View the Detailed Quote Information Click on **View** button.

VIEW QUOTE INFORMATION

On Click of View Button from Quote Request listing page, Customer would be able to see all the information of Quote on this page.

On Left Side, there is Chat History with Admin and Seller for customer, Once Customer Request any quote, all the Communication between **Admin/ Seller** with Customer can be checked here. Customer can enquire anything from the Reply From along with any Attachment to be submitted for the Quote.

Reply - Customer can Reply to Admin/Seller regarding any query along with attachment, Admin will also Receive Email regarding this query if Email Notification from Admin is enabled from Configuration.

On Right Side customer would be able to see the **Quote Information**

Status – There are 4 Status in the Extension right now, One is Pending, When customer Request any Quote then Pending Status is Set, After that admin/Seller can change the Status to **Processing, Approved, and Sold.**

If Quote is approved by Seller/Admin then Customer can add the product to cart from listing page or from Email Link for Add to cart received by admin, once product is added to cart, its status is automatically set to **Sold.**

Reported at – This is Time and Date of Requesting a Quote.

Product Name – IF Product is assigned then it will show product link else Product name as filled in Generic Form.

Quantity Required – Quantity required for this Quote, Set by Customer, or can be change by Admin also.

Price Quoted (for each item) - Price Quoted by admin/ Seller for the Product. This Price is per Item of the product.

Quote #6

Joust Duffle Bag

Customer - roni_cost@example.com Replied at October 15, 2019 9:36 AM

I want to buy Joust Duffle Bag with 5 quantity.

Customer - roni_cost@example.com Replied at October 15, 2019 9:36 AM

This is dewsc

Reply:

No file selected.

Note - File types allowed are pdf, doc, docx, xls, xlsx, csv, txt, jpg, jpeg, png, gif

Quotes Information

Status: Approved

Reported at: October 15, 2019 9:36 AM

Product Name: [Joust Duffle Bag](#)

Quantity required: 4

Price Quoted: (for each item) \$8.00

ADMIN OPTIONS

QUOTE REQUESTS

Admin can view all the request received from Customers or Guests from Generic as well as from Product. Then admin would take action on the request by Replying to the customer or just approving the Quote with Price for Customer.

If Product is assigned to Quote Request or Admin has raised request regarding any product then, Link for Product Name Link is visible on List and admin can check the product from there.

Same is with the Customer if already registered customer raised the request then Customer link is available for that customer else simple customer name is visible without link.

Admin can also **delete** the Quote Request from List, just click on Delete in front of each Request or Delete multiple requests using checkbox.

Quote Requests

Search by keyword

Filters | Default View | Columns | Export

Actions 6 records found | 20 per page | 1 of 1

ID	Product Name	Customer Name	Customer Email ID	Customer Phone	Status	Created	Created	Action
1	Demo Pro	first lastt	ptsdemodemo@gmail.com	145454141	Pending	Oct 15, 2019 2:24:51 PM	Oct 15, 2019 2:24:51 PM	Select
2	Strive Shoulder Pack	first lastt	ptsdemodemo@gmail.com	145454141	Pending	Oct 15, 2019 2:41:18 PM	Oct 15, 2019 2:24:53 PM	View Delete
3	Fusion Backpack	firstt lastt	ptsdemodemo@gmail.com	145414541	Pending	Oct 15, 2019 2:26:14 PM	Oct 15, 2019 2:26:14 PM	Select
4	Fusion Backpack	Veronica Costello	roni_cost@example.com	(555) 229-3326	Sold	Oct 17, 2019 1:06:13 PM	Oct 15, 2019 2:37:11 PM	Select
5	Product1	Veronica Costello	roni_cost@example.com	(555) 229-3326	Pending	Oct 15, 2019 2:37:30 PM	Oct 15, 2019 2:37:30 PM	Select
6	Joust Duffle Bag	Veronica Costello	roni_cost@example.com	(555) 229-3326	Sold	Oct 18, 2019 11:37:49 AM	Oct 15, 2019 3:06:09 PM	Select

VIEW QUOTE INFORMATION

Admin can view the Quote Information on click of View button from listing. On View page there all the information regarding quote

On Left Side, there is Chat History with Customer and Seller for Admin, Once Customer Request any quote, all the Communication between **Admin/ Seller** with Customer can be checked here. Admin can enquire anything from the Reply From along with any Attachment to be submitted for the Quote.

Reply - Admin can reply to Customer regarding any query along with attachment, Customer will also Receive Email regarding this query if Email Notification for Customer is enabled from Configuration.

Quote #5

Product1

Customer - **roni_cost@example.com** Replied at October 15, 2019 9:07 AM

I want to buy Product1 with 50 quantity.

Customer - **roni_cost@example.com** Replied at October 15, 2019 9:07 AM

demo sescrip df df df d

Reply:

No file selected.

Note - File types allowed are pdf, doc, docx, xls,xlsx, csv, txt, jpg, jpeg, png, gif

On Right Side admin would be able to see the **Quote Information**

Customer Information

Name – Customer Name along with Customer link, if guest then only customer name will be displayed here.

Email ID - Email ID of Customer or guest.

Phone No – Phone number filled in form by customer.

Business name, Industry, GST No, PAN No – These filed will only be visible if filled up by customer.

Customer Information

Name: Veronica Costello
Email ID : roni_cost@example.com
Phone No : (555) 229-3326
Business name: Business
Industry: induss
GST No: GSTTT
PAN No: PANN

Quote Information

Status – There are 4 Status in the Extension right now, One is Pending, When customer Request any Quote then Pending Status is Set, After that admin/Seller can change the Status to **Processing, Approved, and Sold.**

If Quote is approved by Seller/Admin then Customer can add the product to cart from listing page or from Email Link for Add to cart received by admin, once product is added to cart, its status is automatically set to **Sold.**

Reported at – This is Time and Date of Requesting a Quote.

Product Name – IF Product is assigned then it will show product link else Product name as filled in Generic Form.

Quantity Required – Quantity required for this Quote, Set by Customer, or can be change by Admin also.

Price Quoted (for each item) - Price Quoted by admin/ Seller for the Product. This Price is per Item of the product.

Quotes Information

Status: Approved
Product: [Joust Duffle Bag](#)
Quantity: 4
Proposed Price: (for each item) \$ 8
Reported at: October 15, 2019 9:36 AM

Change Quote Information

Admin can change the Quote Information; some of the following information can be changed.

Status - Admin can change the Status of the Quote Request, once Request is received the status is set to **Pending, Processing, Approved, Sold**.

On setting Status to **Approved**, Customer would receive Email Regarding the Quote along with **Add to cart** Link for the approved price and Quantity only if Email notification for customer is enabled from configuration.

Price (for each item) - Set Price for each item in here.

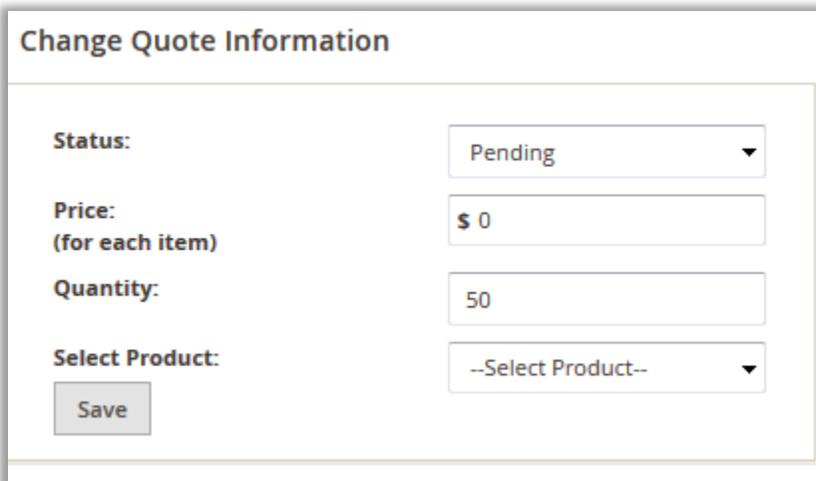
Quantity - Set the Quantity for the quote.

Select Product – If product is not selected and customer has requested the Quote from Generic Form from Header or footer, then admin can assign product to the Quote. Right now only simple and Virtual Products are supported in the extension which are visible on Frontend.

Select the Product from list and Click on **save** button.

Admin would not be able to Set Status to **Approved** or **Sold** if **Price** of the Quote is not set or set to **0**. Enter valid value in price for setting the Approved and Sold Status.

On click of **save** button the Quote information will be updated and Customer would receive email regarding the same if Email Notification for customer is enabled.



Change Quote Information

Status: Pending

Price: (for each item) \$ 0

Quantity: 50

Select Product: --Select Product--

Save

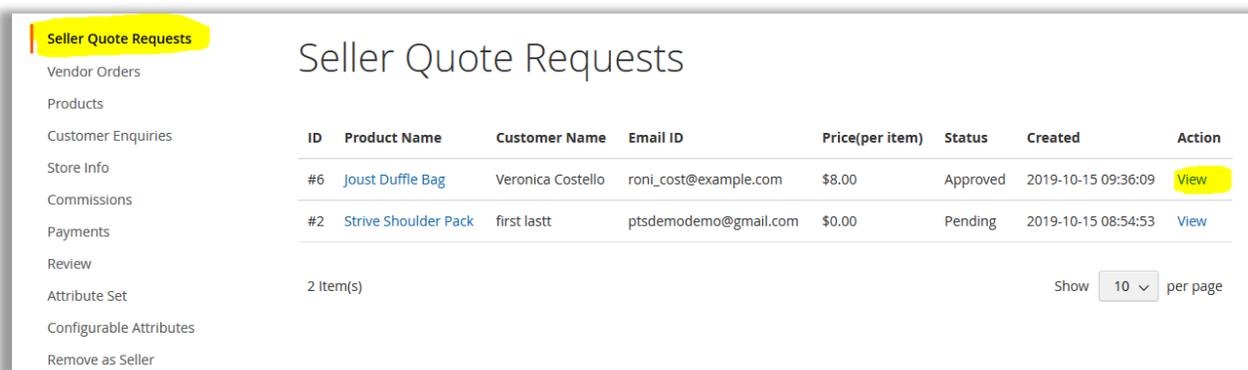
SELLER QUOTE REQUESTS

If Purpletree Multivendor is installed and Seller is logged into the website and Requested Quote Product is of Seller then Seller can change quote information.

In Seller Login, in Seller Panel, New Menu item is added as **Seller Quote Requests**. Click on this menu item.

Seller can view all the request received from Customers or Guests from Seller Product. Then Seller would take action on the request by Replying to the customer or just approving the Quote with Price for Customer.

If Customer if already registered customer raised the request then Customer link is available for that customer else simple customer name is visible without link.



ID	Product Name	Customer Name	Email ID	Price(per item)	Status	Created	Action
#6	Joust Duffle Bag	Veronica Costello	roni_cost@example.com	\$8.00	Approved	2019-10-15 09:36:09	View
#2	Strive Shoulder Pack	first last	ptsdemodemo@gmail.com	\$0.00	Pending	2019-10-15 08:54:53	View

2 Item(s) Show 10 per page

VIEW SELLER QUOTE INFORMATION

Seller can view the Quote Information on click of View button from listing. On View page there all the information regarding quote

On Left Side, there is Chat History with Customer and Seller /Admin, Once Customer Request any quote, all the Communication between **Seller** with Customer/Admin can be checked here. Seller can enquire anything from the Reply From along with any Attachment to be submitted for the Quote.

Reply - Seller can reply to Customer regarding any query along with attachment, Customer will also Receive Email regarding this query if Email Notification for Customer is enabled from Configuration.

Quote #6

Joust Duffle Bag

Customer - **roni_cost@example.com** Replied at October 15, 2019 9:36 AM

I want to buy Joust Duffle Bag with 5 quantity.

Customer - **roni_cost@example.com** Replied at October 15, 2019 9:36 AM

This is dewsc

Seller - **roni_cost@example.com** Replied at October 18, 2019 11:27 AM

This is Seller Reply

Attachment [Download File](#)

Admin - **owner@example.com** Replied at October 18, 2019 11:28 AM

This is Admin Reply

Reply:

No file selected.

Note - File types allowed are pdf, doc, docx, xls, xlsx, csv, txt, jpg, jpeg, png, gif

On Right Side Seller would be able to see the **Quote Information**

Customer Information

Name – Customer name will be displayed here.

Email ID - Email ID of Customer or guest.

Phone No – Phone number filled in form by customer.

Business name, Industry, GST No, PAN No – These filed will only be visible if filled up by customer.

Quote Information

Status – There are 4 Status in the Extension right now, One is Pending, When customer Request any Quote then Pending Status is Set, After that admin/Seller can change the Status to **Processing, Approved, and Sold.**

If Quote is approved by Seller/Admin then Customer can add the product to cart from listing page or from Email Link for Add to cart received by Seller, once product is added to cart, its status is automatically set to **Sold.**

Reported at – This is Time and Date of Requesting a Quote.

Product Name – IF Product is assigned then it will show product link else Product name as filled in Generic Form.

Quantity Required – Quantity required for this Quote, Set by Customer, or can be change by Seller/Admin also.

Price Quoted (for each item) - Price Quoted by admin/ Seller for the Product. This Price is per Item of the product.

Customer Information

Name: VeronicaCostello
Email ID :
roni_cost@example.com
Phone No : (555) 229-3326
Business name: Business
Industry: induss
GST No: GSTTT
PAN No: PANN

Quote Information

Status: Approved
Product: Joust Duffle Bag
Quantity: 4
Proposed Price: (for each item) \$8.00
Reported at: October 15, 2019
9:36 AM

Change Quote

Seller can change the Quote Information; some of the following information can be changed.

Status - Seller can change the Status of the Quote Request, once Request is received the status is set to **Pending, Processing, Approved, Sold.**

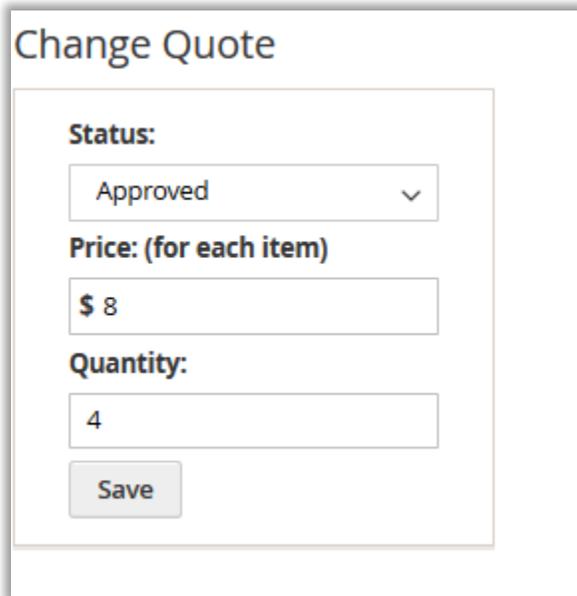
On setting Status to **Approved**, Customer would receive Email Regarding the Quote along with **Add to cart** Link for the approved price and Quantity only if Email notification for customer is enabled from configuration.

Price (for each item) - Set Price for each item in here.

Quantity - Set the Quantity for the quote.

Seller would not be able to Set Status to **Approved** or **Sold** if **Price** of the Quote is not set or set to **0**. Enter valid value in price for setting the Approved and Sold Status.

On click of **save** button the Quote information will be updated and Customer would receive email regarding the same if Email Notification for customer is enabled.



Change Quote

Status:
Approved

Price: (for each item)
\$ 8

Quantity:
4

Save

SUPPORT

In case of any issues, please open a support ticket with our helpdesk at <https://www.helpdesk.purpletreesoftware.com> with following information:

1. Order Id
2. FTP credentials or cpanel login credentials
3. Database login credentials or cpanel login credentials
4. Admin login credentials for Magento
5. SSH login information