

## User guide

# ONLINE QUOTATION

Version 1.0.22

The “Online Quotation” module, developed by PrestaShop, allows your customers to request a quote on your online store!

You can create a custom form for your customers to request a quote for products they are interested in, and you then gather all of the information you need to make your quote.

Below you will find all the information you need to understand and use this module.

### Contents:

1. *Documentation tab*
2. *Configuration tab*
3. *Quote Form tab*
4. *Quote tab*
5. *Quotes from the customer’s point of view*
6. *Contact tab*

## 1. DOCUMENTATION TAB

At any time, you can use this tab to help you in the different elements of configuring the module by watching the module’s video tutorial.

## 2. CONFIGURATION TAB

In this tab, you can choose to configure the Test mode that will give you a preview of the quote that you are going to create on your site. By activating this, a new “test mode IP address” field will appear; this lets you see only your quote on the computer of your choice.

With this mode, no visitor can see the quote!



*I don't know my IP address, what should I do?*

*Don't panic, we've thought of everything! Simply click on "Add my IP address" and it will be added automatically. You are now certain that only you will see your test quote. If you want to have another person test your quote, ask them for their IP address and insert it there.*

When you want your quote to be available for all of your customers, deactivate test mode, and your quote form will be shown to all of your customers on your store.

Mode test

ACTIVER

DÉSACTIVER

Adresse IP pour le mode test

11.22.333.44

Ajouter mon IP

You can also add a prefix to the quote ID to make them easier to manage.

The quotes created can also only be visible to part of your customer groups. If you only want to offer your customers the ability to request quotes, then just activate their profile:

#### GROUPS AUTHORIZATION

Nom du groupe	Status
Visiteur	✗
Invité	✗
Client	✓

Click on "Save" once your settings have been configured!

## QUOTE FORM TAB

Now, follow our step-by-step guide to create your first quote!

Let's go, click on "New quote".

Before starting, note that you will have to fill in all required fields, for each of your store's languages.  
You can switch from one language to another easily from these tabs:

CRÉEZ ET ÉDITEZ LE FORMULAIRE DU DEVIS

Bienvenue dans l'interface de configuration d'un formulaire de devis !  
Ici vous pourrez créer votre propre formulaire adapté à votre activité. Pour commencer, cliquez sur " Nouveau formulaire ". Vous trou

SÉLECTIONNEZ UNE LANGUE

FR

en



Nouveau devis

In the first step, you'll give your quote a name.



Why give my quote a name?

*A different name for each quote form will let you find quotes that you want to activate or deactivate easier.*

Once this has been done, you can add elements to your form.

Here are the features you can insert:

- static text that will let you write an introduction sentence to your quote
- a text field that will let your customer draft a long answer
- a text zone that will let your customer add specifics
- check boxes so they can choose several options, for example
- radio buttons if, however, they can only give one answer
- a drop-down menu that can shorten your quote's presentation by letting your customer choose from a list
- and a separator to add space to your quote!

You can customize your font's style or size with included tools when you create or edit a field:

Fermer ENREGISTRER

You see a preview of your quote just below that updates as it's being created.



Sélectionnez les éléments que vous souhaitez afficher sur votre formulaire de devis et traduisez-le à tous les langues.

Texte statique

Champ de texte

Zone de texte

Cases à cocher



*Voici le rendu de votre texte statique !*  
 VOUS POUVEZ FAIRE DES SOUS-TITRES COMME ICI

ou bien utiliser une police normale - **à vous de choisir !**

1. vous pouvez également
2. énumérer des exemples, notions, ect
3. pour rendre votre devis plus compréhensible



What are each field's little icons for?

You can edit or delete a field using these tools. With the drag & drop tool, you can easily change the order of your fields.



Exemple du champ texte

Don't forget to save your quote once you're finished!

Find the list of quote forms that you have created in the same tab. Note that, by default, the form that you just created is deactivated. Click on the red "X" to activate it (in test or live, depending on your configuration). You can also modify it by clicking on the corresponding button.

### 3. QUOTE TAB

This tab gathers all of the quotes that you have already received from your customers.

Here is the information available to you:

- the quote name (this is the name that you gave it when creating your quote!)
- the customer's name
- the quote's status (approved by the customer, being studied, approved by the seller, declined, canceled, and being modified)
- the number of items
- unread messages
- the detail that lets you see the details of the quote request.

#### Why use statuses for quotes?



*These statuses will let you organize how you process your quotes. Once the quote request has been sent (**approved by the customer status**), you need to study it (**being studied status**). At this stage, you can fill in the discount that you'll give the customer. After this, the customer can accept or decline your offer (**ordered or declined status**). You can also cancel a quote via the "**canceled**" status and the customer can change their pending quote; the status will then be "**being modified**".*

In the quote detail, you can:

- Customize the quote price by changing the quote status to "Being studied":

#### CRÉATION DE REMISE ET VALIDATION DU DEVIS

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- View messages that the customer sends and respond via your interface:

[Retour à la liste des devis](#)[Envoyer/Voir les messages \(1\)](#)

## Détails du devis

When you click on “Send/See messages”, a pop-in is displayed:

Messages X

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Client - 2016-10-04 16:40:34

Bonjour, je voudrais avoir un prix spécifique pour l'achat de ces articles en plusieurs exemplaires. Merci.

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Styles ▼ Format ▼

**B** **I** | ↶ ↷ | ✂ | 📄 | 📧 | ☰ ☱ ☲ ☳ ☴ ☵ ☶ ☷ | 🔗 | 📄 Source

Entrez votre texte ci-dessous pour envoyer un message au client ...

Envoyer

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Fermer

Once the discount has been created, the customer receives an email alert.

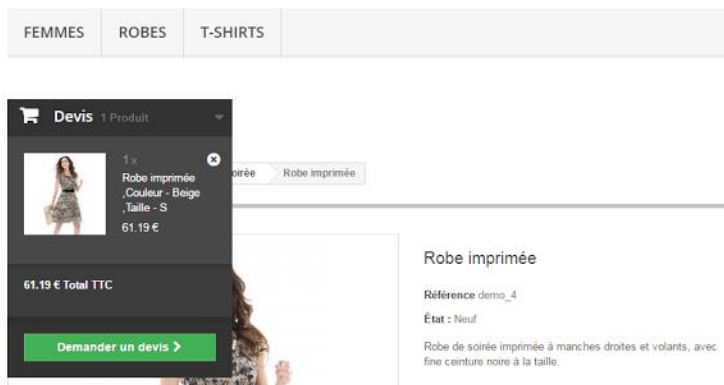
## 4. QUOTES FROM THE CUSTOMER'S POINT OF VIEW

Here, we will see how the customer sees the quote.

- [\*Step 1: the quote request\*](#)

To request a quote, the customer must click on “Add a quote” on the page(s) of the products they want to buy.

Then, they must confirm their quote by clicking on the “Quote” icon at the bottom of the menu on the left, and fill in the quote request form:

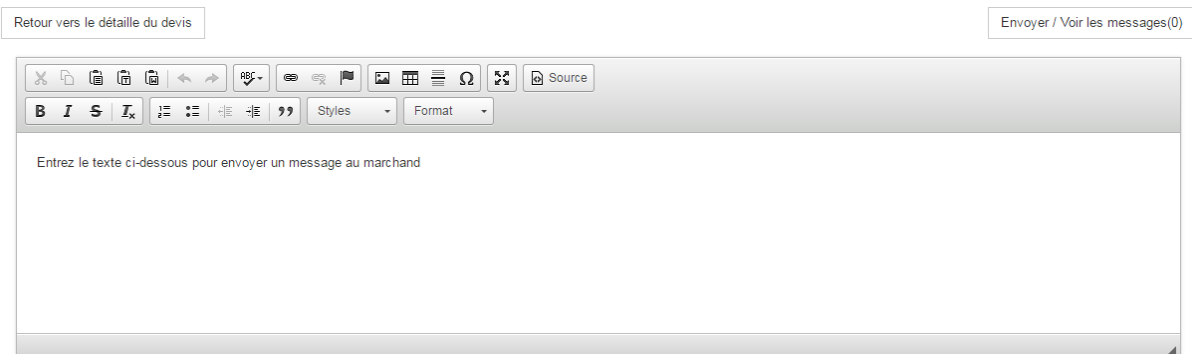


- [\*Step 2: modify their sent quote\*](#)

They can easily modify their quote in the “Quote” tab in their customer account.

- [\*Step 3: communicate with the seller, if necessary\*](#)

The customer can contact you directly from the quote themselves. For this, they must go into the details of the quote in question and click on “Send/see message” on the right to contact you. A page then opens to draft the message:



Your message history is also displayed here!



- [Step 4: see the quote history](#)

From their account, the customer can access the list of quotes sent and their status.

## 5. CONTACT TAB

Get our contact details for any questions you may have about using the module.

If you have more general questions on using our solution, here is the [PrestaShop User Guide](#) where you can find all of the information you need to make the most of PrestaShop.

The entire PrestaShop Team thanks you for your trust and wishes you great success with the Online Quotation module!

*The Online Quotation module was developed by the PrestaShop Team, guaranteeing perfect compatibility with the PrestaShop e-commerce software.*