

Manage Quotes

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Overview

The Manage Quotes module for Miva, gives you a robust quoting system tied directly into the Miva software. It allows both your customers to add products to their cart and submit a quote request as well as your sales team to manage and respond to quotes customers submit.

With advanced features like the ability to easily convert a quote to an order, quote expiration date with auto reminders emails, and quote notes to allow a back and forth conversation between you and the customer, the Manage Quotes module is the most powerful quoting tool for Miva.

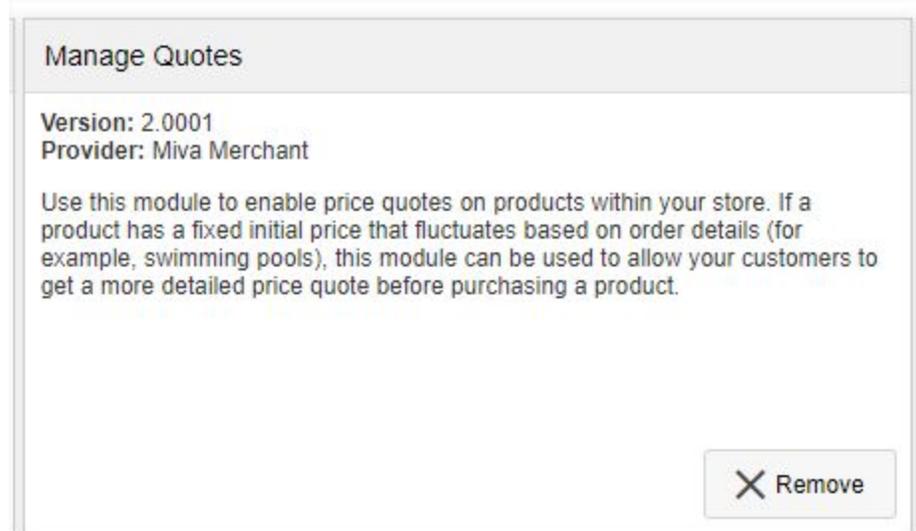
Installation

The Manage Quotes module can be downloaded from the App Store:

<https://apps.miva.com/manage-quotes.html>

Once downloaded, follow these steps to install the module in your Miva Store:

1. Upload the quote.mvc file under **Modules**
2. Under **Utilities**, install the Manage Quotes module to your store



Permission Levels

In order to have access to use the Manage Quotes module within the Miva admin, your admin user must have the correct permission level set within Miva. Below are the minimum permission levels required:

Utility - View

Order Processing - Add/Edit

Customer - View

Product - View

Because quotes are linked tightly with orders, (you can convert a quote to an order) users must also have access to order processing as well.

You can create a new Group for Manage Quote users, or modify one of the existing groups to give them the access they need.

Module Setup

Once installed, there will be 3 new tabs under Utilities

Quote Emails

There are 5 customizable email templates

Enabled	Name
<input checked="" type="checkbox"/>	Send Quote: Customer
<input checked="" type="checkbox"/>	Quote Requested: Customer
<input checked="" type="checkbox"/>	Quote Requested: Merchant
<input checked="" type="checkbox"/>	Quote Expired: Customer
<input checked="" type="checkbox"/>	Quote Reminder: Customer

Each template is a full HTML template and can be customized however you like to add your logo or update the style to match your store.

Example Email Template

Test
5060 Shoreham Place, Suite 330
San Diego, CA 92122
US

 **Quote Successfully Received**

Your Quote # [1000](#)

Quote Submitted On: 12/16/2018 12:15:36 PST

Quote Expires: Never

Hello Brennan,

This is confirmation to confirm we have received your request for a quote on the items below. We will get back to you with an updated quote as soon as possible.

[View Quote](#)

Quote Details

Submitted By

Brennan Heyde
bheyde@miva.com
760-809-4756
92009
US

Additional Information

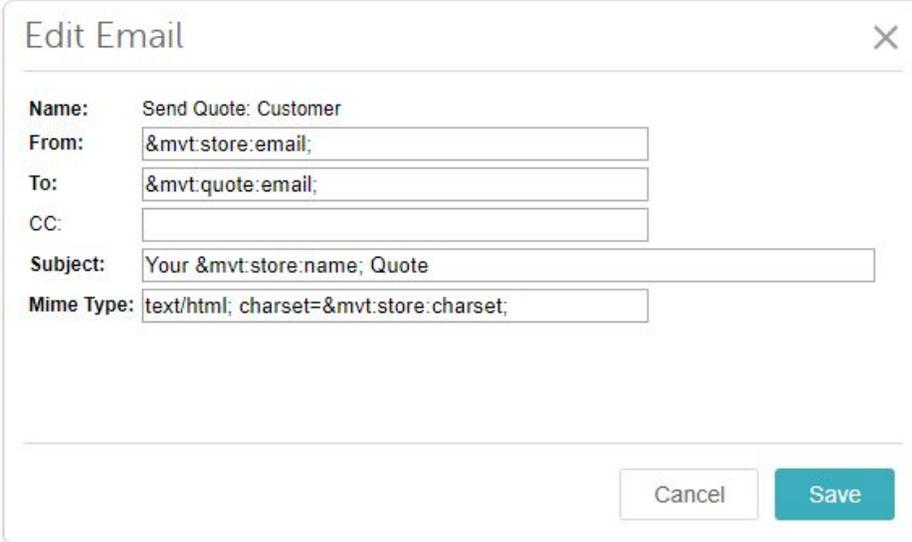
Terms

Comments

Hello World

Item	Qty	Price	Total
------	-----	-------	-------

The Subject, To and From can also be customized on a per email basis



The image shows a dialog box titled "Edit Email" with a close button (X) in the top right corner. The dialog contains several fields for email configuration:

- Name:** Send Quote: Customer
- From:** &mvt.store:email;
- To:** &mvt.quote:email;
- CC:** (empty field)
- Subject:** Your &mvt.store:name; Quote
- Mime Type:** text/html; charset=&mvt.store.charset;

At the bottom right of the dialog, there are two buttons: "Cancel" and "Save".

Quote Configuration

The Quote Configuration screen provides general settings for the module, including required customer fields and whether or not the customer can modify their quote after it has been added to their cart for purchase.

Utility Settings

Template Based Batch Reports | Order Workflows | Order Workflow Queues | Quote Emails | **Quote Configuration**

Send Quote Reminder Every day(s) until quote expires

- Accepted Quote Basket Items:
- Allow customers to update quantity
 - Do not allow customers to update quantity
 - Allow customers to remove quote items
 - Do not allow customers to remove quote items
 - Remove all quote items when a customer removes any item

Standard Fields:

Field	Hidden	Required	Optional
First Name	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Last Name	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Email Address	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Phone Number	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Zip/Postal Code	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Country	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Comment	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Basket Contents	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

Default Quote Terms:

1	
2	
3	
4	
5	
6	
7	
8	
9	
10	
11	
12	

Quote Custom Fields

The quote custom fields functions very similar to other types of custom fields (product, customer, etc). They allow you to setup fields specific to your needs and save that data associated with each quote.

Code	Prompt	Type	Required	Default
<input type="button" value="X"/> rep	Sales Rep	Text Field	<input type="checkbox"/>	

These custom fields are then accessible on a per quote level

Quote 1002
12/16/2018, 12:56:12 PM | Customer: bheyde - Brennan Heyde [Edit](#)

[Notes](#)
[Custom Fields](#)

Requester
Brennan Heyde
bheyde@mw.com
8587314220
92127
US
[Edit](#)

[Cancel](#) [Add Items](#) [Send Quote](#) [Copy Quote](#) [Convert](#)

Code
 Same
 Test

[Delete This Quote](#)

Quote Custom Fields [X]
Quote expires: 12/31/2018, 12:56:27 PM
Sales Rep:

[Cancel](#) [Save](#)

Quantity	Weight	Price/Ea.	T
1	0.00	25.00	25
1	0.00	25.00	25
			Total: \$5

The quote custom fields are available on any of the quote emails as well as the two new quote pages which get created when the module is installed: QUOT - Quote Information and QUOH - Quote History List

Custom Fields:

rep

[Select >](#)
[< Deselect](#)

Notes:

Versions:
Original [Recall](#) [Clear History](#)

Quote Page Templates

When the Manage Quotes module is installed, it automatically creates two new page templates

1. Quote History List (QUOH)
2. Quote Information (QUOT)

These page templates will need to be customized to match your stores look and feel. If you are using Shadows, you can [download pre-styled versions of these pages here](#).

Quote Information Page

[Home](#) [All Products](#) [Account](#) [Basket](#) [Search](#) [Checkout](#)

Quote Information

Quote #1003
Quote Date: 01/03/2019 12:37:40 PST
Expiry Date: No expiry

Thank you for requesting a quote. Below is a summary of the quote details

Requester	Additional Information
First Name: Brennan Last Name: Heyde Email Address: bheyde@miva.com Phone Number: 555-555-5555 Zip/Postal Code: 92009 Country: US Comment:	

Code	Product	Qty.	Price	Total
Sample	Sample	1	\$25.00	\$25.00
			Total:	\$25.00

[Add quote to basket](#)

Request a change for Quote #1003

Request:

Notes	Date added

Quote History List

This screen is similar to Order History but shows a logged in customers quote history.

[Home](#) | [All Products](#) | [Account](#) | [Basket](#) | [Search](#) | [Checkout](#)

[Home](#) » [Quote History List](#)

Quote History [Logout](#)

<u>Quote ID</u>	<u>Order ID</u>	<u>Code</u>	<u>Status</u>	<u>Created</u>	<u>Expires</u>	
1000	None	0N2K-3L40-U8CL-4Q4U	Accepted	12/16/2018	No expiry	View
1002	None	EJW3-XLL4-L4GL-U888	Expired	12/16/2018	12/31/2018	View
1003	None	36ST-FQC4-QLU4-40GC	Sent	01/03/2019	No expiry	View

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Ecommerce Shopping Cart Software by [Miva](#)

Template Customizations

There are 5 areas of the site which need to be updated / customized when setting up Manage Quotes.

1. New Page Templates - QUOH and QUOT need to be styled to match your stores look and feel.
2. Add Link to Quote History on Account Landing Page (ACLN)

`View Quote History`

Note: This link can be added globally to any page as well.

3. Modify LOGN page logic to take customer to QUOT page upon login

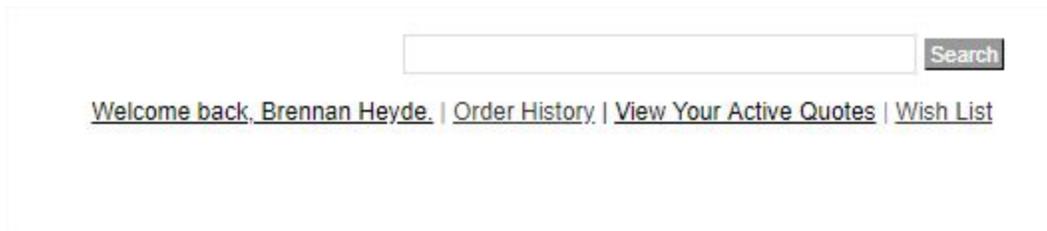
```

1 <mvt:if expr="NOT ISNULL g.QuoteCode">
2     <mvt:assign name="g.login_url" value = "l.settings:urls:QUOT:secure" />
3 </mvt:if>
4 <mvt:else>
5     <mvt:assign name="g.login_url" value = "l.settings:urls:ACLN:secure" />
6 </mvt:if>
7 <form id="logn" action="&mvte:global:login_url;" method="post" autocomplete="off">
8 <input type="hidden" name="Action" value="LOGN" />
9 <input type="hidden" name="QuoteCode" value="&mvte:global:QuoteCode;" />

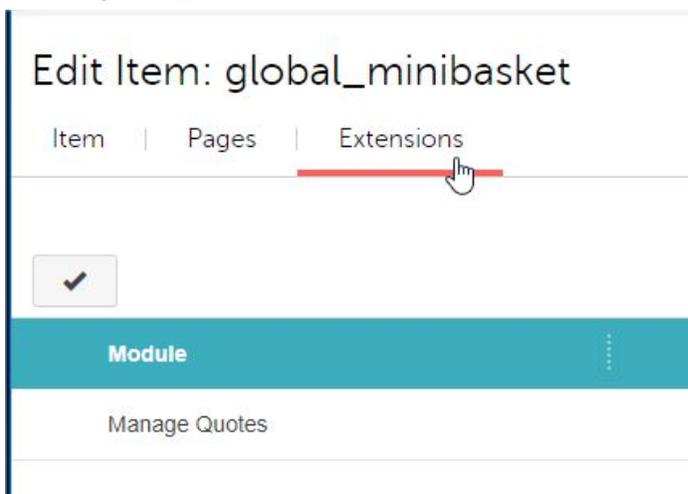
```

<https://snippets.cacher.io/snippet/7ac8e05dd1d7d60d9c40>

4. Optional - Show link if a customer has any active quotes



1. Add the Manage Quotes Module as an extension to any global item such as the global_minibasket.



Next add this code globally (or to any page the mini basket is assigned)

```
active_quotes VIEW ▶ RUN  
  
1 //Customer is logged in and has at least 1 active quote  
2 <mvt:if expr="l.settings:global_minibasket:active_quote EQ 1 AND g.Basket:cust_id">  
3     <a href="&mvte:urls:QUOH:auto;">View Your Active Quotes</a>  
4 </mvt:if>
```

<https://snippets.cacher.io/snippet/0a58e5c5bd2744631cde>

5. Submit Quote Form

The manage quotes module provides a flow to let your customers add items to their cart and submit them for you to quote. This form is flexible and can be put on any page in Miva.

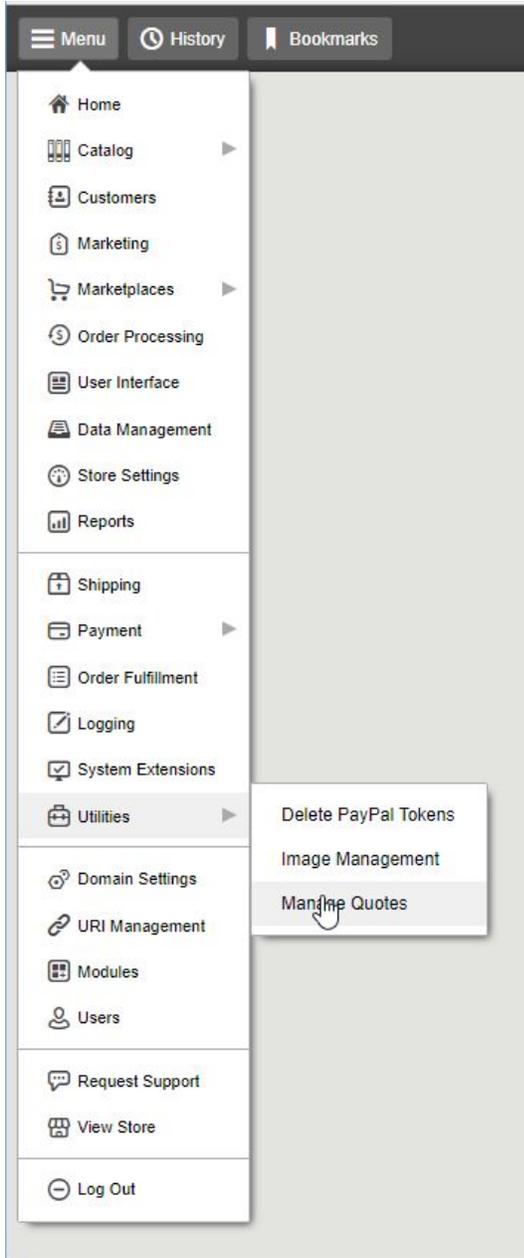
<https://snippets.cacher.io/snippet/f5313b45e4bd1429b828>

Note the country field only accepts the 2 digit country code. If you are going to collect the country its recommended the county be a drop down list instead.

<https://snippets.cacher.io/snippet/c1f712fdb3da3b835b70>

Manage Quotes

The main Manage Quote screen is located under the Utilities fly out menu on the left. We recommend bookmarking it for easier navigation.



The Manage Quotes screen looks and functions very similar to Order Processing in Miva

Home > Manage Quotes

Manage Quotes

Manage Quotes Reset

#1003 New
\$0.00

#1002 Expired
Brennan Heyde
\$50.00

#1001 New
\$5.00

#1000 Accepted
Brennan Heyde
\$50.00

Quote 1002

12/16/2018, 12:56:12 PM | Customer: bheyde - Brennan Heyde Edit

[Notes](#)
[Custom Fields](#)

Requester:

Brennan Heyde
bheyde@miva.com
8587314220
92127
US

Edit

Expiry:

Quote expires: 12/31/2018, 12:56:27 PM
 No expiry date

Delete Add Item(s) Send Quote Copy Quote Convert Quote

<input type="checkbox"/>	Code	Name	SKU	Quantity	Weight	Price/Ea.	Total
<input type="checkbox"/>	Sample	Sample	test	1	0.00	25.00	25.00
<input type="checkbox"/>	test	Test	brennan	1	0.00	25.00	25.00

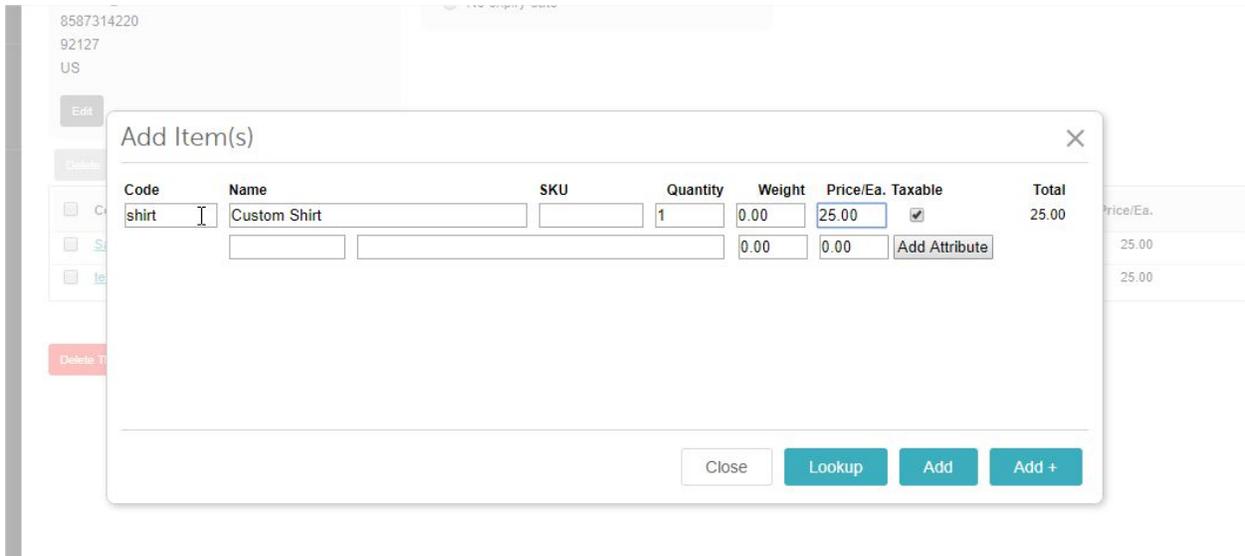
Total: \$50.00

Delete This Quote

From here you can manage existing quotes, create new quotes, add new quote notes and convert quotes to orders.

Add Items To Quote

You can look up existing products or add new ones which don't exist in your product catalog. You also have complete control of the pricing for each item you add.



Send Quote

Once a quote is ready to send to the customer you can hit the send quote button. This will give you a confirmation prompt and trigger an email to the customer letting them know their quote is ready to review.

support-test-01.coolcommerce.net says
Are you sure you want to send this quote to 'bheyde@miva.com' now?

OK Cancel

te 1003
12:37:40 PM | Customer: N/A [Assign](#)

[Add](#)

er:

Heyde
miva.com
555

Expiry:

Quote expires: 1/3/2019, 12:42:27 PM
 No expiry date

[Add Item\(s\)](#) [Send Quote](#) [Copy Quote](#) [Convert Quote](#)

	Name	SKU	Quantity	Weight	Price/Ea.
Add	Sample		1	0.00	25.00

Copy Quote

Using the copy quote button you can start a new quote by using a previous quote as a starting point.

The screenshot displays a quote management interface. At the top, a notification box from 'support-test-01.coolcommerce.net' states 'Quote Copied' and 'You are now editing the new quote.' with an 'OK' button. Below this, the main page shows 'Quote 1003' with a timestamp of '5/2019, 12:37:40 PM' and 'Customer: N/A'. A red 'Assign' button is visible. The 'Requester' field is highlighted in red and contains the name 'Brennan Heyde', email 'heyde@miva.com', phone '55-555-5555', and address '2009 IS'. A blue 'Expiry' field is highlighted in blue. A 'Copying Quote' dialog box with a loading spinner is overlaid on the requester information. Below the requester details are buttons for 'Delete', 'Add Item(s)', 'Send Quote', 'Copy Quote', and 'Convert Quote'. A table below these buttons lists items with columns for Code, Name, SKU, Quantity, Weight, and Price/Ea. The table contains one row: 'Sample' with a quantity of 1, weight of 0.00, and price of 25.00. A red 'Delete This Quote' button is located at the bottom left of the quote details area.

Quote 1003
5/2019, 12:37:40 PM | Customer: N/A | Assign

Requester: Brennan Heyde
heyde@miva.com
55-555-5555
2009 IS

Expiry:

Copying Quote

Delete Add Item(s) Send Quote Copy Quote Convert Quote

Code	Name	SKU	Quantity	Weight	Price/Ea.
Sample	Sample		1	0.00	25.00

Delete This Quote

Convert Quote

When a quote is ready to be manually converted into an order, the convert quote button will create a new order based on the quote. Here you can add taxes and shipping before taking payment.

Quote 1004

1/3/2019, 12:44:34 PM | Customer: N/A [Assign](#)

[Notes](#)
[Custom Fields](#)

Requester:

Brennan Heyde
bheyde@miva.com
555-555-5555
92009
US

[Edit](#)

[Quote](#) [Add Item\(s\)](#) [Send Quote](#) [Copy](#)

Quote Converted to Order #1003.

Would you like to view that order now?

[No](#) [Yes](#)

Code	Name	SKU	Quantity	Weight	Price/Ea.	Total
Sample	Sample		1	0.00	25.00	

Total: \$25.00

[Delete This Quote](#)

Note: Any quote which is manually converted to a order via the admin will have a source of "Manage Quotes" and a Source ID of the Quote ID. This can be useful for running reports or sorting orders by orders which were generated based off a quote.

Billing Last Name	Total	Source	Source ID
Heyde	\$20.00	Manage Quotes	1002

The quote itself will also get an updated status of "Converted To Order"

Manage Quotes

Manage Quotes

None ▾

-Quote #	Date	First Name	Status
1004	1/3/2019, 12:44:34 PM	Brennan	Converted to Order

Quote Notes

Quote notes are a great tool to track the progress of what is happening with a quote throughout its different stages. There are two types of notes:

Public Notes - These are notes which the customer can see when they view the quote within their account.

Private Notes - These are internal notes and are only available when viewing the quote from the admin.

Miva will automatically add notes to an order when the following action occur.

- 1. Quote Sent to Customer
- 2. Quote Converted To Order
- 3. Quote Copied From another Quote

This gives you an audit trail of what has happened with the quote

Notes for Quote 1004

Search Records... [Q] [🔍]

[+], [↺], [📄], [☰]

Public	Note #	Quote #	Note	Source	User
<input checked="" type="checkbox"/>	14	1004	Quote Sent to Customer	Administrator	Administrator
<input type="checkbox"/>	13	1004	Quote Converted to Order #1003	Administrator	Administrator
<input type="checkbox"/>	12	1004	Copied from Quote #1003	Administrator	Administrator

Showing 1-3 of 3

Close

Quote Status

There are 9 different quote statuses which show quotes in different states.

New - This is the default status when a quote is either created in the admin or requested by the customer.

Sent - A quote moves to a “sent” state when the email has been sent to the customer to review the quote.

Modified - When a quote has been modified by the customer.

Accepted - Accepted means the customer has reviewed the quote and added the quote items to their cart.

Viewed - When a customer opens the email to review the quote

Purchased - When a customer complete purchase of a quote.

Expired - When the quote expiration date has passed.

Response Needed - When a customer adds a note to the quote and is waiting some response

Converted to Order - When a quote gets converted into an order from the admin.

Working with Quotes

When a customer reviews the quote and wishes to accept the quote, can do so by clicking the

“Add Quote To Basket” Link

Comment:

Code	Product	Qty.	Price	Total
Sample	Sample	1	\$25.00	\$25.00
			Total:	\$25.00

[Add quote to basket](#)

Request a change for Quote #1003

Request:

Notes	Date added

This changes the quote status to accepted and allows the customer to purchase the items in the quote and the custom prices you quoted for them.

When a quote items are added to the cart an attribute gets automatically added to them to denote they were purchased from a Quote

Shopping Basket

Item	Qty.	Item Price	Total Price
Sample - Sample <i>Product Discount: \$3.75</i>	<input type="text" value="1"/> <input type="button" value="Update"/>	\$15.00	\$15.00 \$11.25
Part of Quote: 1011			
Remove Move To Wish List			
		200F:	(\$2.25)
		Total:	\$9.00

Note: Once the quoted items are in the cart, the customer may or may not be able to modify the quantity or remove and item based on the settings you have configured:

Utility Settings

Template Based Batch Reports

Order Workflows

Order Workflow C

Send Quote Reminder

Every day(s) until quote expires

Accepted Quote Basket Items:

- Allow customers to update quantity
- Do not allow customers to update quantity

- Allow customers to remove quote items
- Do not allow customers to remove quote items
- Remove all quote items when a customer removes any item

Standard Fields

Adding Quote Notes

Customers can view a quote and ask questions right from the quote information screen.

		Total:	\$0.00
Add quote to basket			
Request a change for Quote #1011			
Request:	<input type="text" value="Does this price include shipping?"/>	Notes	Date added
<input type="button" value="Submit"/>			

When a customer adds a comment to a quote it changes the quote status to "Response Needed"

You can then respond to the Question by adding a public note to the quote within the Miva admin

UC Notes for Quote 1011

Search Records...

Public Note # Quote # Note Source User

17 1011 Does this price include shipping? Customer bheyde

Showing 1-1 of 1

Close Add

Close

Price/

Close

Yes this includes freight shipping

I

You'll want to make sure it is a public note so the customer can see it:

Notes for Quote 1011

Search Records...

Public Note # Quote # Note Source User

18 1011 Yes this includes freight shipping Administrator Administrator

17 1011 Does this price include shipping? Customer bheyde

Showing 1-2 of 2

Close

[Add quote to basket](#)

Request a change for Quote #1011

Request:

	Notes	Date added
A	Yes this includes freight shipping	01/04/2019 15:42:41 PST
C	Does this price include shipping?	01/04/2019 15:40:41 PST

[Home](#) | [About Us](#) | [Contact Us](#) | [Shipping & Returns](#) | [Privacy Policy](#) | [FAQs](#) | [All Products](#) | [Sitemap](#)

A = Administrator Response

C = Customer Question

Those Abbreviations can be updated to any text you like via the page template.

Exclude Quotes From Price Groups

There is a special feature which allows you to create a price group of specific name to exclude/override all other price groups. This allows you to exclude quoted items from price group discounts.

To do this create a price group with the name:

Quote Exclusion Price Group

Always use Eligibility of "Coupon Only"

Add Price Group ✕

Name:

Eligibility:

Type:

Discount:

Maximum Discount Amount: (0 = unlimited)

Restrict to Qualifying Subtotal: - (0 = no upper limit)

Restrict to Qualifying Quantity: - (0 = no upper limit)

Restrict to Qualifying Weight: - (0 = no upper limit)

Restrict to Basket Subtotal: - (0 = no upper limit)

Restrict to Basket Quantity: - (0 = no upper limit)

Restrict to Basket Weight: - (0 = no upper limit)

Basket Description:

Display Discount in Basket

Not Valid Before:

Not Valid After:

Priority:

Exclusions:

-
-
-

Make sure to give it a higher priority than other price groups and set which other price groups you want to exclude.

Quote Expiration & Follow Up Emails

Every quote has the ability to set a unique quote expiration date .

Quote 1014

1/4/2019, 3:51:30 PM | Customer: bheyde - Brennan Heyde [Edit](#)

[Notes](#)
[Custom Fields](#)

Requester:

Brennan Heyde
bheyde@miva.com
555-555-5555
92009

[Edit](#)

[Delete](#) [Add Item\(s\)](#) [Send Quote](#) [Copy Quote](#)

Code

[Delete This Quote](#)

Expiry:

Quote expires: 1/4/2019, 4:06:50 PM
 No expiry date

Select Date and Time

January 2019

Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

HH:MM:SS
04:06:50
AM PM

[Done](#)

The customer can see this expiration date in both the emails they get as well as the quote detail page.

Once a quote expires the customer will not be able to accept the quote and complete checkout.

Quote Reminder & Quote Expired Emails

There are 2 scheduled tasks which get setup when the module gets installed

Task Name	Frequency	Last Run	Next Run	Details
Pre-Calculate Discount Prices	Every 1 day(s)	1/4/2019, 3:54:30 PM	1/5/2019, 3:54:30 PM	Standard Scheduled tasks: Pre-Calculate Dis...
<input checked="" type="checkbox"/> Send Expired Quote Emails	Every 1 day(s)	1/4/2019, 1:55:24 PM	1/5/2019, 1:55:24 PM	Manage Quotes: Send Quote Expiry Email
<input checked="" type="checkbox"/> Send Quote Reminder Emails	Every 1 day(s)		12/17/2018, 12:04:17 PM	Manage Quotes: Send Quote Reminder Emails

1. Send Expired Quote Emails - This is enabled by default and will notify the customer when their quote expires.
2. Send Quote Reminder Emails - This is off by default and needs to be enabled if you wish to use it. It will send the customer a reminder email every X days up until the quote expires. These settings are located in the Quote Configuration tab under Utilities. The default is every 10 days.

The screenshot shows a web interface titled "Utility Settings". Below the title, there are three tabs: "Template Based Batch Reports", "Order Workflows", and "Order". The "Order" tab is currently selected. Under the "Order" tab, there is a section for "Send Quote Reminder" which is currently disabled (indicated by a greyed-out checkbox). To the right of this checkbox, there is a text input field containing the number "10", followed by the text "day(s) until quote expires". Below this, there is a partially visible section for "Accepted Quote Basket Items" with a dropdown arrow.