Manage Quotes

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.
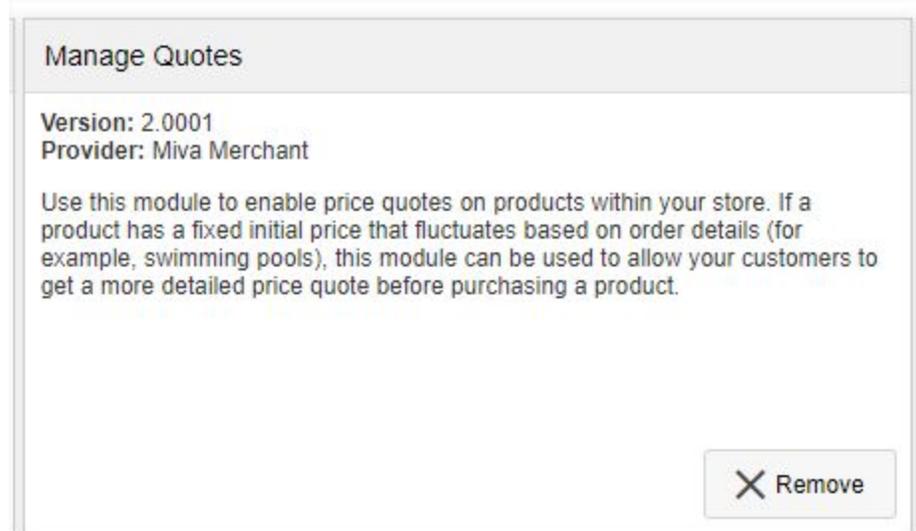
Installation

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

Manage Quotes

Version: 2.0001
Provider: Miva Merchant

Use this module to enable price quotes on products within your store. If a product has a fixed initial price that fluctuates based on order details (for example, swimming pools), this module can be used to allow your customers to get a more detailed price quote before purchasing a product.

✕ Remove

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
⬤	Send Quote: Customer
⬤	Quote Requested: Customer
⬤	Quote Requested: Merchant
⬤	Quote Expired: Customer
⬤	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

✓ 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	Additional Information
Brennan Heyde	
bheyde@miva.com	**Terms**
760-809-4756	
92009	
US	

Comments

Hello World

Item	Qty	Price	Total

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

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

Send Quote Reminder Every [10] 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	○	●	○
Last Name	○	●	○
Email Address	○	●	○
Phone Number	○	●	○
Zip/Postal Code	○	○	●
Country	○	○	●
Comment	○	○	●
Basket Contents	○	○	●

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
✕	rep	Sales Rep	Text Field ▼	☐	

These custom fields are then accessible on a per quote level

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

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

Quote History List

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

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.

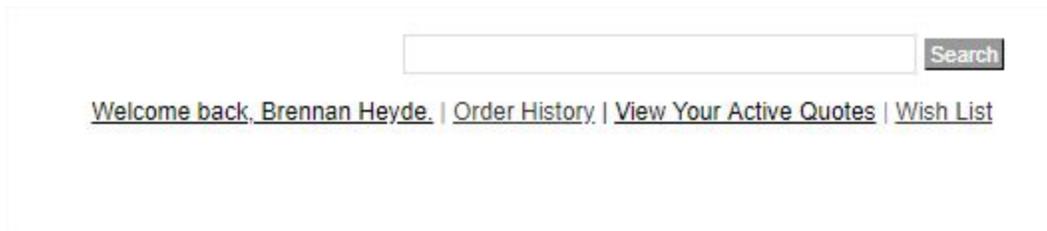3. Modify LOGN page logic to take customer to QUOT page upon login

```
1   <mvt:if expr="NOT ISNULL g.QuoteCode">
2        <mvt:assign name="g.login_url" value = "l.settings:urls:QUOT:secure" />
3   <mvt:else>
4        <mvt:assign name="g.login_url" value = "l.settings:urls:ACLN:secure" />
5   </mvt:if>
6
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;" />
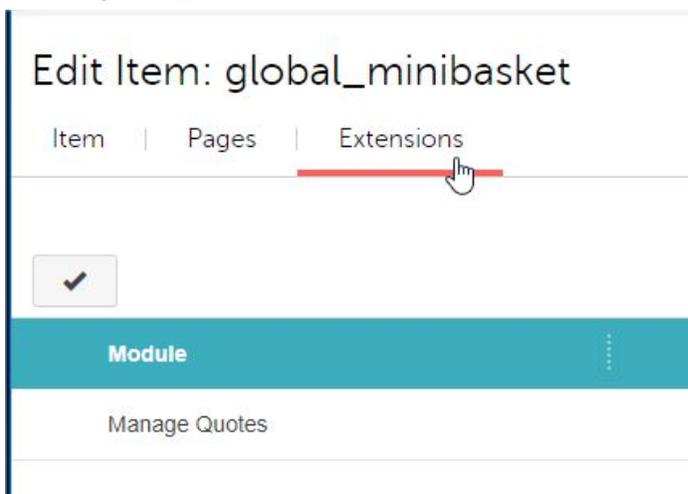```

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.

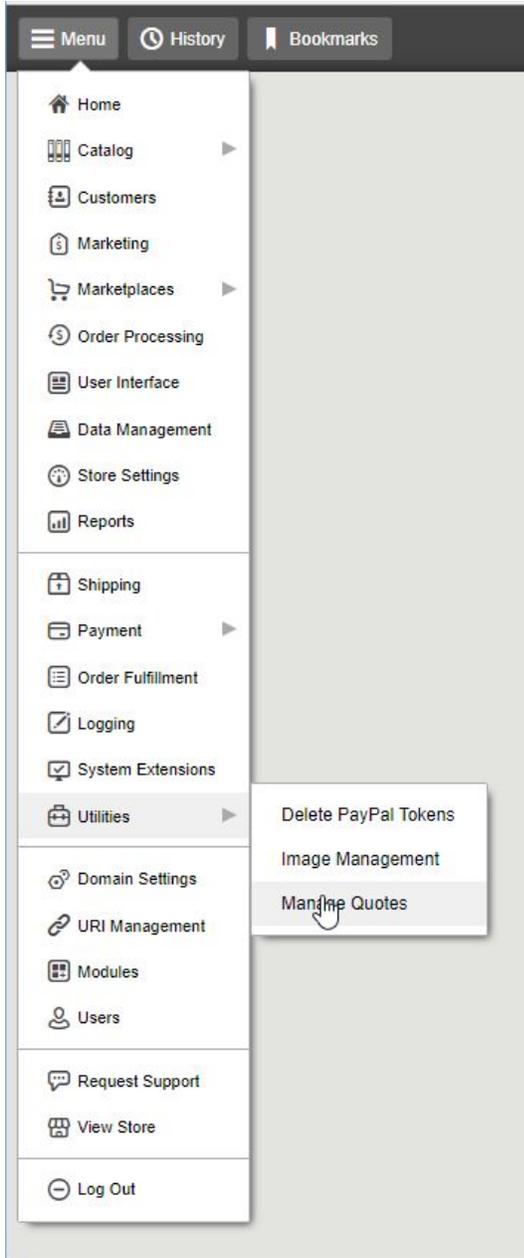https://snippets.cacher.io/snippet/f5313b45e4bd1429b828

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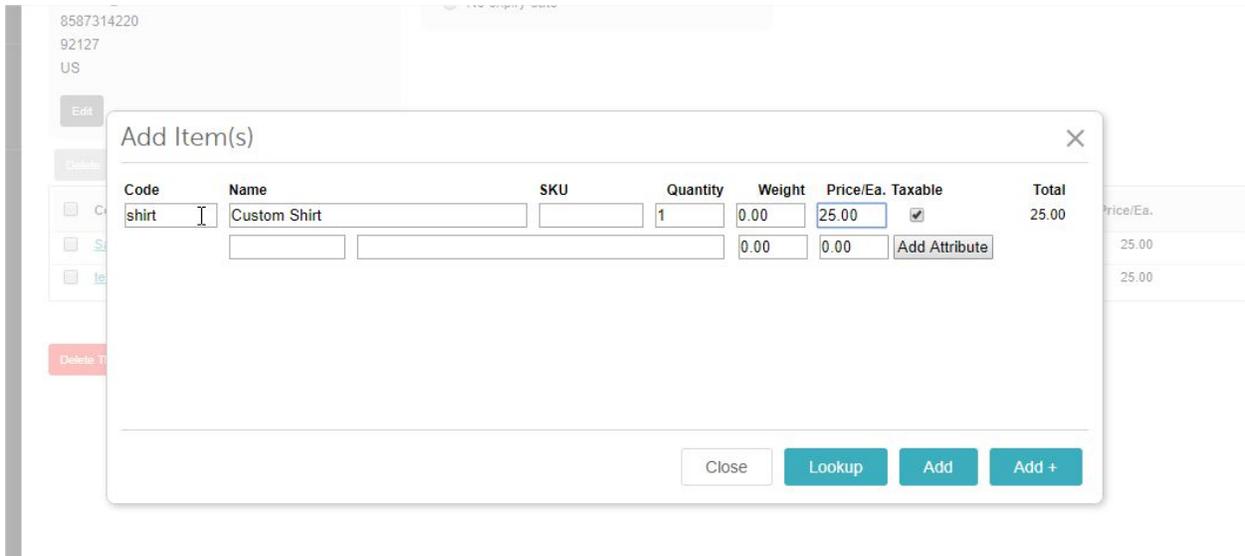
From here you can manage existing quotes, create new quotes, add new quote notes and convert quotes to orders.

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

elds

er: Expiry:

Heyde   ○ Quote expires: 1/3/2019, 12:42:27 PM
miva.com   ● No expiry date
555

Add Item(s)   Send Quote   Copy Quote   Convert Quote

e	Name	SKU	Quantity	Weight	Price/Ea.
ple	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.

support-test-01.coolcommerce.net says

Quote Copied

You are now editing the new quote.

OK

Quote 1003

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

tes
stom Fields

Requester:

3rennan Heyde
heyde@miva.com
55-555-5555
2009
IS

Edit

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.

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.

The quote itself will also get an updated status of "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

Public	Note #	Quote #	Note	Source	User
⬤	14	1004	Quote Sent to Customer	Administrator	Administrator
⬤	13	1004	Quote Converted to Order #1003	Administrator	Administrator
⬤	12	1004	Copied from Quote #1003	Administrator	Administrator

Notes for Quote 1004

Search Records...

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

Submit

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 Product Discount: $3.75	1 Update	$15.00	$15.00 $11.25
Part of Quote: 1011			
Remove | Move To Wish List			
		20OF:	($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 (

Send Quote Reminder   Every `10`   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: `Does this price include shipping?`

Notes	Date added

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

Notes for Quote 1011

Search Records...

Public	Note #	Quote #	Note	Source	User
⬤	17	1011	Does this price include shipping?	Customer	bheyde

Add Note ✕

Yes this includes freight shipping

Close   Add

Showing 1-1 of 1

Close

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

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"

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 .

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

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 be 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.

Utility Settings

| Template Based Batch Reports | Order Workflows | Ord |

Send Quote Reminder   Every `10`   day(s) until quote expires

Accepted Quote Basket Items: