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**Miva Merchant**  
**Manage Quotes**

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v1.0



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## Overview

The **Manage Quotes** module provides a robust quoting system tied directly into the Miva software. It allows your customers to add products to their cart and submit a quote request. Your sales team manages and responds to the quotes that customers submit.

The **Manage Quotes** module is the most powerful quoting tool for Miva. Advanced features include:

- The ability to easily convert a quote into an order;
- Quote expiration date with automatic reminder emails;
- Quote notes to allow a back and forth conversation between you and the customer.


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## Installing the Module

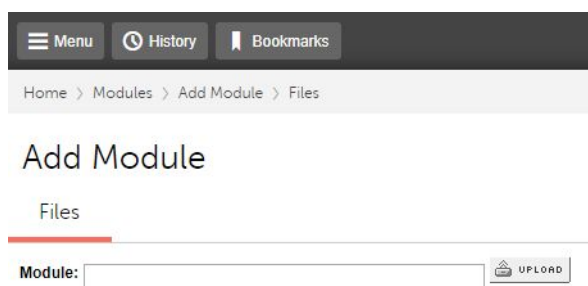
The **Manage Quotes** module can be downloaded from the app store at the following link:

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


Once you have downloaded the **.mvc** file, perform the following steps to install the module.

1. From the Miva Merchant admin screen, go to **Modules** and click the  **(Add Module)** button.

The **Add Module** screen displays.



**Figure 1:** Add Module screen

2. Click .

The **Upload File** dialog appears.

3. Click **Choose File** and navigate to the **quote.mvc** file that you downloaded from the app store.
4. Click **Upload**.

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## Miva Merchant

### *Installing the Module*

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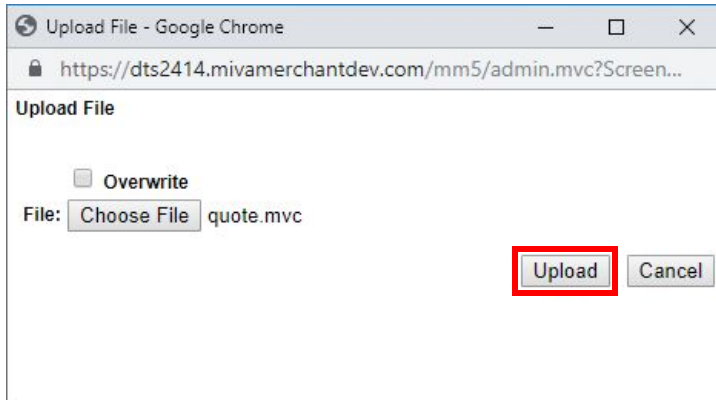



Figure 2: Upload File dialog

5. Click the  button.
6. Go to **Utilities > Add/Remove Modules**.

Once you have uploaded it, the **Manage Quotes** module appears under **Available Modules**.

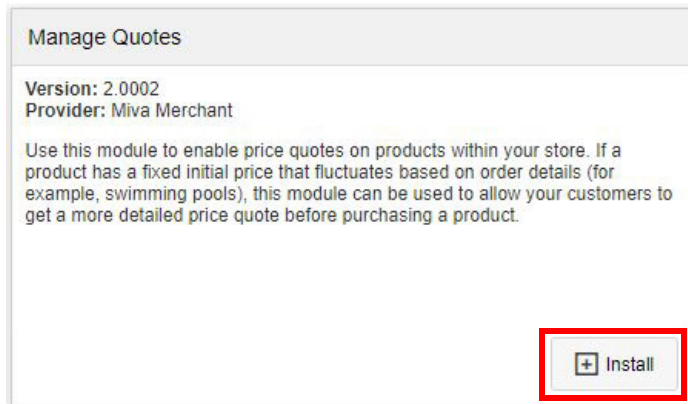



Figure 3: Manage Quotes module

7. Click the **Install** button.

The module description moves from the **Available Modules** section to the **Installed Modules** section. If you wish to uninstall it, click on the  button.

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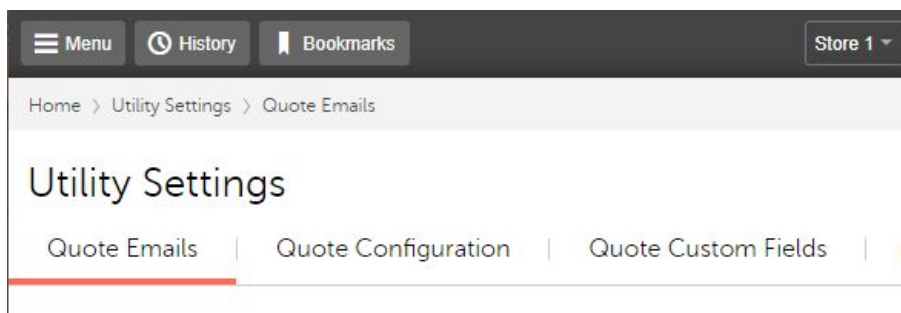
**Note:** The **Manage Quotes** module does not have its own tab on the **Utility Settings** screen. Once installed, you can get to **Manage Quotes** by clicking on the **Utilities** sub-menu from the main menu button:  **> Utilities > Manage Quotes**.

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## Setting Up the Module

After installing the **Manage Quotes** module, there will be three new tabs under **Utilities**:

- **Quote Emails**
- **Quote Configuration**
- **Quote Custom Fields**



**Figure 4:** Utility Settings

### Quote Emails

There are five customizable email templates:

- Send Quote: Customer
- Quote Requested: Customer
- Quote Requested: Merchant
- Quote Expired: Customer
- Quote Reminder: Customer

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

**Figure 5:** Quote Emails email templates

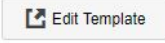
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## Miva Merchant

### Setting Up the Module

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

To edit an email template, select it from the list and click on the  button. This opens a TextArea field showing the template code to be edited.

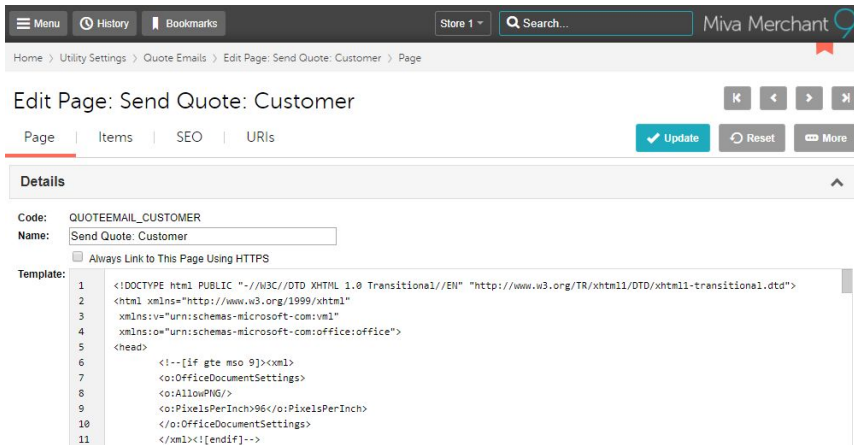



Figure 6: Edit Template screen

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**Note:** If you select more than one email template via the checkboxes () , the edit options will disappear from the button bar.

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**Example**

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**

<p><b>Submitted By</b></p> <p>Brennan Heyde bheyde@miva.com 760-809-4756 92009 US</p>	<p><b>Additional Information</b></p> <p><b>Terms</b></p>
---	--

**Comments**

Hello World

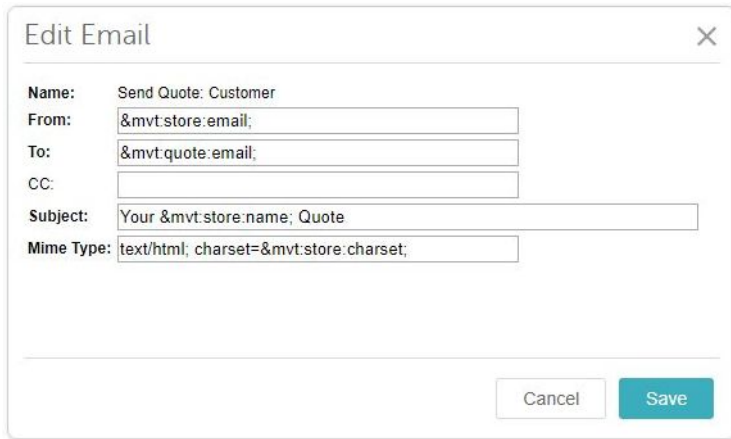
---

Item	Qty	Price	Total
Sample	1	\$25.00	\$25.00

**Figure 7:** Quote Requested: Customer email

You can also edit the email Subject, To and From fields on a per email basis. Select the Edit button

(  ) instead of the  button.



The 'Edit Email' dialog box contains the following fields:

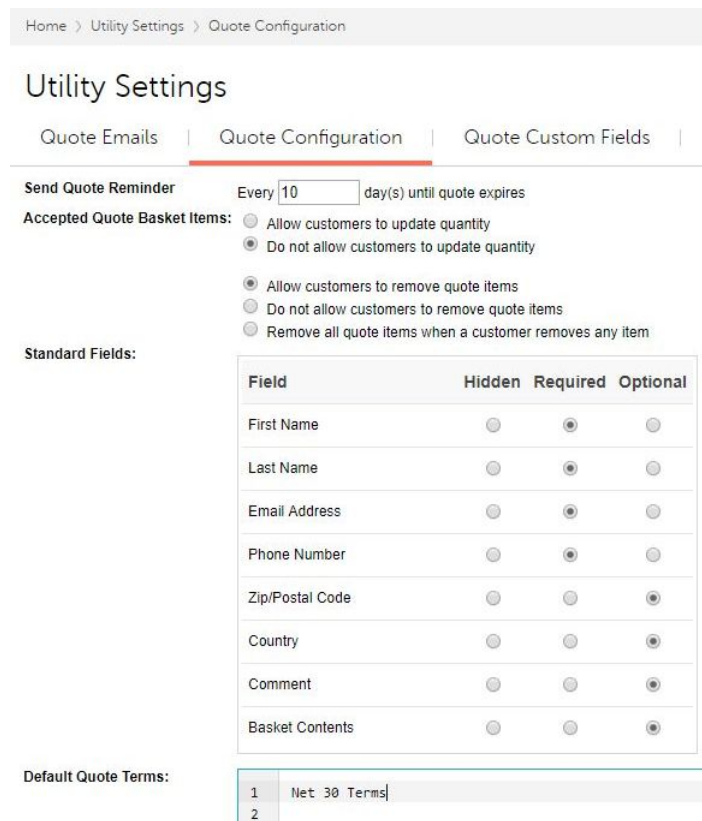
- Name: Send Quote: Customer
- From: &mvt.store.email;
- To: &mvt.quote.email;
- CC:
- Subject: Your &mvt.store.name; Quote
- Mime Type: text/html; charset=&mvt.store.charset;

Buttons: Cancel, Save

Figure 8: Edit Email dialog

## 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.



Home > Utility Settings > Quote Configuration

### Utility Settings

Quote Emails | **Quote Configuration** | Quote Custom Fields

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:

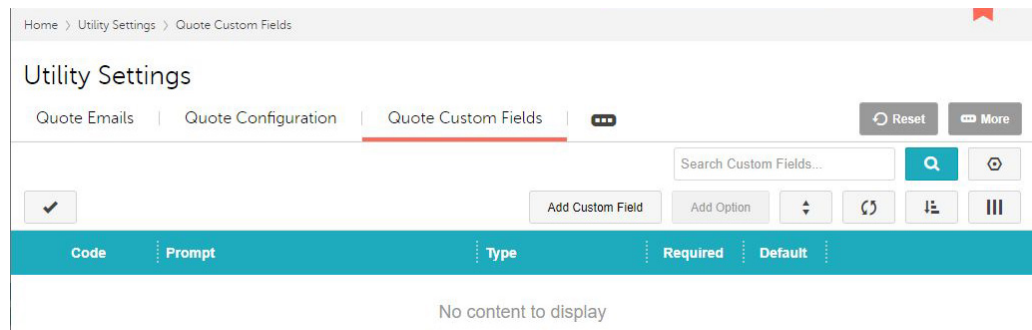
1	Net 30 Terms
2	

Figure 9: Quote Configuration screen

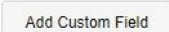
The **Default Quote Terms** text area allows you to place your default terms in the quote as text. For example, “Net 30 Terms” as shown in **Figure 9**.

## Quote Custom Fields

The optional **Quote Custom Fields** option functions very similarly to other types of custom fields (product, customer, etc). It allows you to setup fields specific to your needs and save the data associated with each quote. These custom fields are then accessible on a per quote level.



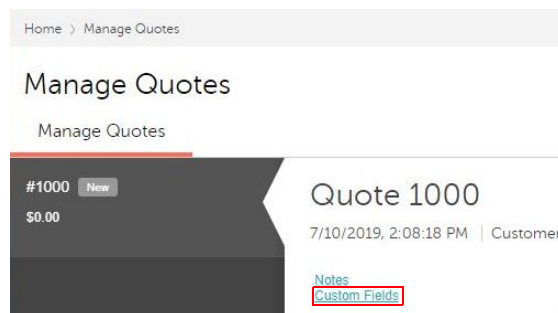
**Figure 10:** Quote Custom Fields screen

To add a custom field, click on the  button.



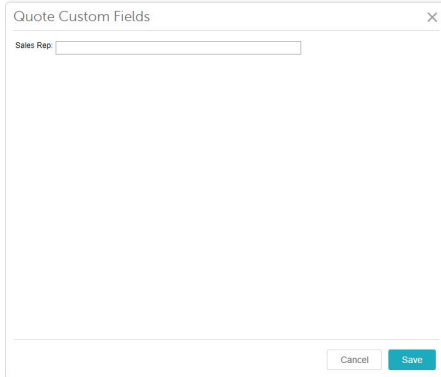
**Figure 11:** Adding a Custom Field

Once added, custom fields are accessible on a per quote basis.



**Figure 12:** Quote with Custom Fields link

When you select the **Custom Fields** link, the **Quote Custom Fields** dialog displays with any custom fields that you added (see **Figure 11**).



**Figure 13:** Quote Custom Fields dialog

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## *Quote Page Templates*

The quote custom fields are available on any of the quote emails as well as the two new quote pages:

- **QUOT** – Quote Information
- **QUOH** – Quote History List

When the **Manage Quotes** module is installed, it automatically creates these two page templates. These page templates can be customized to match your store’s look and feel.

## **Template Customization**

There are five areas of your site that need to be updated/customized when setting up Manage Quotes:

1. New Page Templates – **QUOH** and **QUOT** should be styled to match your store’s look and feel;
2. Add link to the Quote History List (**QUOH**) on the Account Landing Page (**ACLN**);
3. Modify Customer Login page (**LOGN**) to take customer to **QUOT** page upon login;
4. Show link if a customer has any active quotes (optional);
5. Submit Quote Form.

### ***1. Styling Page Templates***

If you are using the *Shadows* ReadyTheme, you can download pre-styled versions of these pages at the following link: <https://github.com/mivaecommerce/Extensions/tree/master/quote>

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**Note:** If your store uses the *Shadows* or *Colossus* ReadyTheme, you need to add code to some page templates for them to display correctly.

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Go to **User Interface > Pages** and add the following code to **BASK, OCST, OSEL, OPAY, INVC**, and any email templates you are using. It should immediately follow this line:

```
<mvt:foreach iterator="option" array="group:options">
```

The new code is below.

```
<mvt:if expr="l.settings:option:attr_code EQ 'Part of Quote'">
  <mvt:assign name="l.settings:option:attr_prompt"
    value="l.settings:option:attr_code" />
<mvt:else>
  <mvt:assign name="l.settings:option:attr_prompt"
    value="l.settings:option:attr_prompt" />
</mvt:if>
```

### 2. Adding Link to Quote History List

To add a link to the Quote History page from the Account Landing page, add the following line of code to the **ACLN** page template:

```
<a href="{&mvte:urls:QUOH:auto;}">View Quote History</a>
```

---

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

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### 3. Modify Customer Login Page


Add the following code to the **LOGN** page template:

```
<mvt:if expr="NOT ISNULL g.QuoteCode">
  <mvt:assign name="g.login_url" value = "l.settings:urls:QUOT:secure" />
<mvt:else>
  <mvt:assign name="g.login_url" value = "l.settings:urls:ACLN:secure" />
</mvt:if>

<form id="logn" action="{&mvte:global:login_url;}" method="post" autocomplete="off">
<input type="hidden" name="Action" value="LOGN" />
<input type="hidden" name="QuoteCode" value="{&mvte:global:QuoteCode;}" />
```

### 4. Show Link for Active Quotes

You can add the **Manage Quotes** module as an extension to any global item. For example, to add Manage Quotes to the **global\_minibasket**, perform the following steps:

1. Go to **User Interface > Items**.
2. Find **global\_minibasket** in the list and click on the **Edit** button (  ).

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## Miva Merchant

### Quote Page Templates

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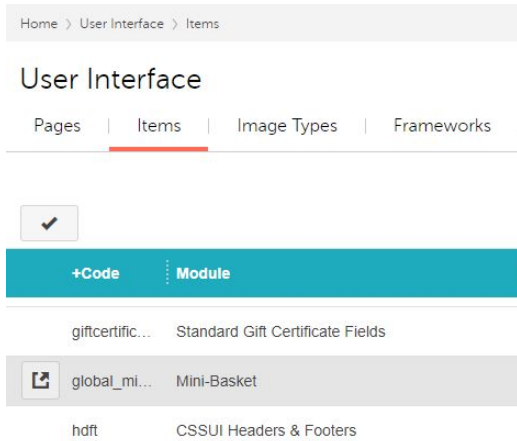


Figure 14: User Interface > Items page

3. Click on the **Extensions** tab.

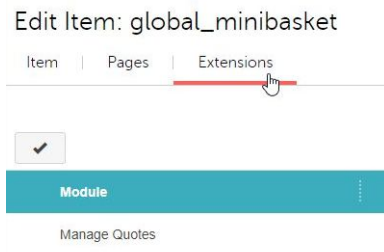


Figure 15: Edit Item page

4. Select Manage Quotes module from the Module list.
5. Add the following code globally or to any page to which the mini basket is assigned:

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

When the customer logs into the store, they will see the “View Your Active Quotes” link in the navigation bar:



### 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. You can download a template for the quote form at the following link:

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

**Note:** The country field only accepts the 2-digit country code. We recommend that you use a drop-down list to collect the country designation.

The following link includes the HTML code to create a drop-down list of country codes.

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

## Manage Quotes

The main Manage Quotes screen is located under **Menu > Utilities > Manage Quotes**. We recommend bookmarking this page for easier navigation.

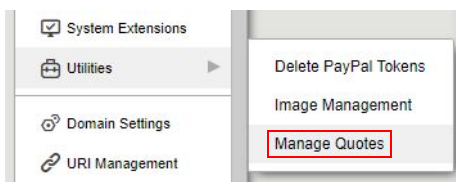


Figure 16: Navigating to Manage Quotes

The **Manage Quotes** screen looks and functions very similarly to **Order Processing**. From here you can manage existing quotes, create new quotes, new quote notes, and convert quotes to orders.

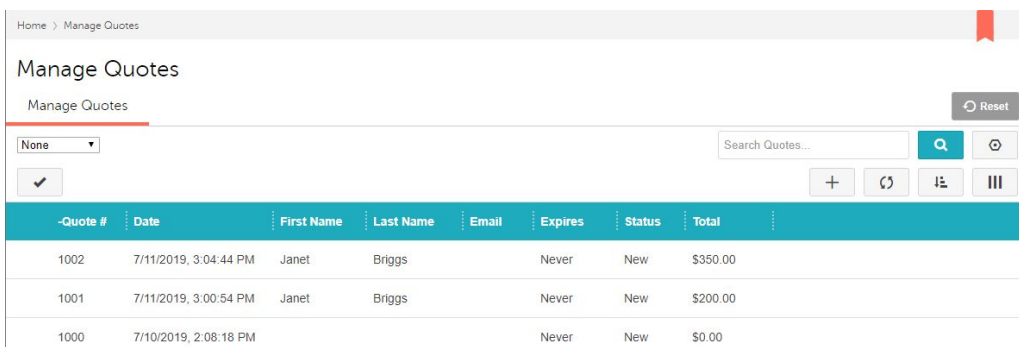



Figure 17: Manage Quotes screen

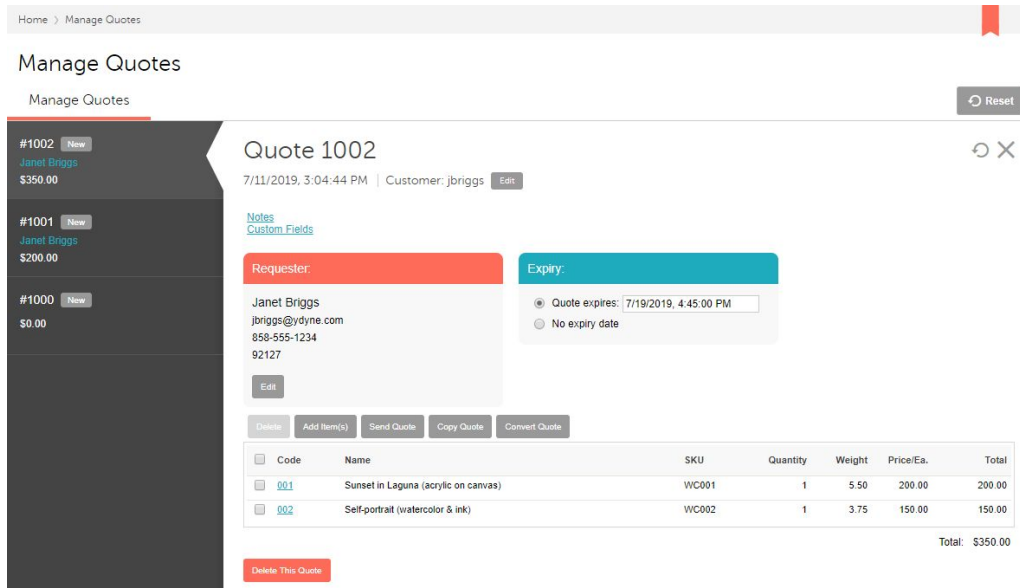
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## Miva Merchant

### Manage Quotes

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To view or edit an existing quote, select it from the list and click the Edit button (  ).



The screenshot shows the 'View Quote' interface. On the left is a sidebar with a list of quotes: #1002 (Janet Briggs, \$350.00), #1001 (Janet Briggs, \$200.00), and #1000 (Janet Briggs, \$0.00). The main area displays 'Quote 1002' for customer 'jbriggs' on 7/11/2019. It includes fields for 'Requester' (Janet Briggs, jbriggs@ydyne.com, 858-555-1234, 92127) and 'Expiry' (7/19/2019, 4:45:00 PM). Below these are buttons for 'Delete', 'Add Item(s)', 'Send Quote', 'Copy Quote', and 'Convert Quote'. A table lists items: 'Sunset in Laguna (acrylic on canvas)' (SKU WC001, 1 unit, 5.50 weight, 200.00 price) and 'Self-portrait (watercolor & ink)' (SKU WC002, 1 unit, 3.75 weight, 150.00 price). The total is \$350.00. A 'Delete This Quote' button is at the bottom left.

Figure 18: View Quote screen

You can edit all sections of the quote from the View Quote screen or navigate to other quotes from the gray sidebar on the left. Quote numbers are automatically assigned sequentially.

## Add Items to Quote

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

To add an item to the quote, click the  button. The Add Item(s) dialog displays.



Code	Name	SKU	Quantity	Weight	Price/Ea.	Taxable	Total
			1	0.00	0.00	<input checked="" type="checkbox"/>	0.00
				0.00	0.00	<input type="checkbox"/>	

**Figure 19:** Add Item(s) dialog

The **Lookup** button launches the Product Lookup dialog from which you can select existing products to add to the quote. When you select a product, it populates the fields in the Add Item(s) dialog.

If you want to add a new item that doesn't exist in your product catalog, enter the field information (Code, Name, SKU, etc.) manually. You can also add attributes (new or existing). When you have finished entering the data for one item, click **Add** if you are finished or **Add +** if you want to continue adding items.

## Send Quote

When a quote is ready to send to the customer, click on the **Send Quote** button. A confirmation dialog displays. Click OK to trigger an email to the customer informing them that their quote is ready to review.

dts2414.mivamerchantdev.com says  
Are you sure you want to send this quote to 'llarkin@miva.com' now?

**OK** **Cancel**

**Figure 20:** Send Quote confirmation

## Copy Quote

You can start a new quote via the **Copy Quote** button. This uses the displayed quote as a template. Click OK on the confirmation dialog to create a new quote with the data from the previous quote.

# Miva Merchant

## Manage Quotes

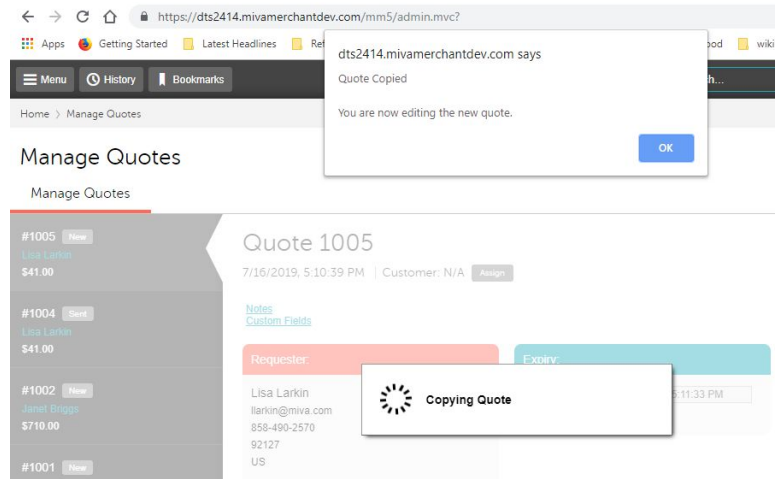


Figure 21: Copying a Quote

## Convert Quote

When a quote is ready to be manually converted into an order, the **Convert Quote** button creates a new order based on the quote. You can add taxes and shipping charges before taking payment.

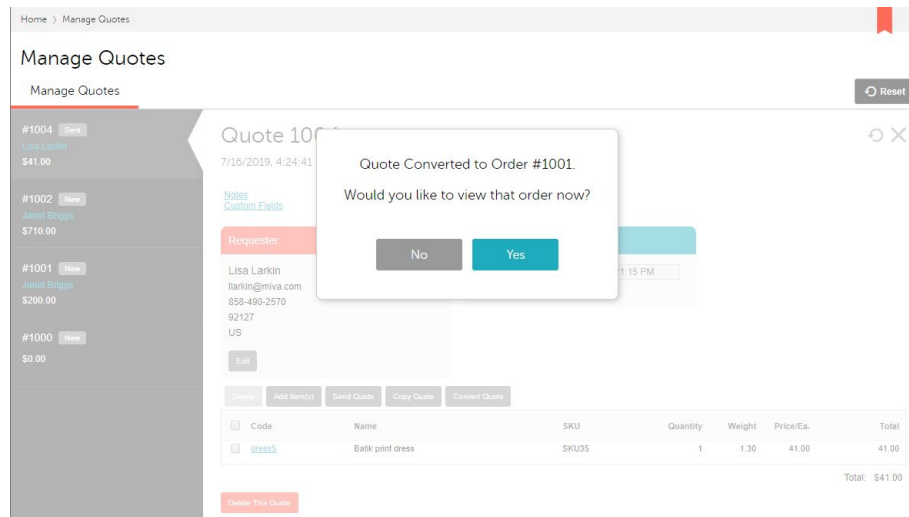


Figure 22: Quote Converted to Order

**Note:** Any quote that is manually converted into an order via the admin will have a **Source** of “Manage Quotes” and a **Source ID** that is the same as the Quote ID. This can be useful for running reports or sorting orders which were generated from a quote.

Home > Order Processing > Orders

Order Processing

Orders | Shipments | Subscriptions | Authorization Failures

Date Range: Last 90 Days

Search Orders...

Order #	Status	Date	Billing First Name	Billing Last Name	Total	Source	Source ID
1002	Pending	7/16/2019, 5:23:34 PM	Lisa	Larkin	\$41.00	Manage Quotes	1001
1001	Pending	7/16/2019, 5:21:38 PM	Lisa	Larkin	\$41.00	Manage Quotes	1002
1000	Pending	7/10/2019, 12:21:40 PM			\$0.00	Manage Quotes	1003

Figure 23: Order Processing with Converted Quotes

The quote itself gets an updated status of “Converted to Order”.

Home > Manage Quotes

Manage Quotes

None

Search Quotes...

Quote #	Date	First Name	Last Name	Email	Expires	Status	Total
1004	7/16/2019, 4:24:41 PM	Lisa	Larkin	llarkin@miva.com	Never	Converted to Order	\$41.00

Figure 24: Manage Quotes - Converted to Order

## Quote Notes

Quote Notes are a tool to track the progress of a quote throughout its different stages. There are two types of notes:

- **Public Notes** – Notes that the customer can see when they view a quote within their account;
- **Private Notes** – Internal notes that are only available when viewing the quote from the admin.

Miva automatically adds notes to an order when the following actions occur:

- Quote sent to customer;
- Quote converted to order;
- Quote copied from another quote.

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## Miva Merchant

### Quote Status

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

### Quote 1004

7/16/2019, 4:24:41 PM | Customer: N/A [Assign](#)

[Notes](#)

[Custom Fields](#)

**Requester:**

Lisa Larkin  
llarkin@miva.com  
858-490-2570  
92127  
US

**Expiry:**

Quote expires: 7/16/2019, 7:51:32 PM  
 No expiry date

Figure 25: Notes link

To view the notes attached to a quote, click on the “Notes” link from the View Quote screen. A dialog entitled “Notes for Quote *NNNN*” displays, where *NNNN* is the quote number.

Notes for Quote 1004

Search Records...

Public	Note #	Quote #	Note	Source
<input type="checkbox"/>	8	1004	Quote Converted to Order #1001	Administrator
<input type="checkbox"/>	4	1004	Quote Copied to Quote #1005	Administrator
<input type="checkbox"/>	3	1004	Quote Sent to Customer	Administrator

Showing 1-3 of 3

Figure 26: Quote Notes

---

## Quote Status

There are nine different quote status values that show quotes in different states:


- **New** – When a quote is either created in the admin or requested by the customer;
- **Sent** – A quote moves to a “sent” state when an email has been sent to the customer for review;
- **Modified** – When a quote is modified by the customer;

- **Accepted** – 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 completes purchase of the quote;
- **Expired** – When the quote expiration date has passed;
- **Response Needed** – When a customer adds a note to the quote and is waiting for a response;
- **Converted to Order** – When a quote gets converted into an order from the admin.

## Working with Quotes

A customer can review a quote by clicking the “Review Quote” link in the quote email.

Store 1  
16745 W. Bernardo Drive, suite 400  
San Diego, CA 92127  
US

 **Your Quote Is Ready To Review**  
 Your Quote # 1004  
 Quote Submitted On: 07/16/2019 16:24:41 PDT  
 Quote Expires: Never

Hello Lisa,

Your quote is now ready to review! Below is a summary for your records.

[Review Quote](#)

**Quote Details**

Submitted By	Additional Information
Lisa Larkin <a href="mailto:llarkin@miva.com">llarkin@miva.com</a> 858-490-2570 92127 US	<b>Terms</b>

**Comments**

Item	Qty	Price	Total
Batik print dress dress5	1	\$41.00	\$41.00
<b>Total:</b>			<b>\$41.00</b>

Figure 27: Review Quote email

Clicking on the “Review Quote” button launches the Quote Information page.

**Miva Merchant**  
**Working with Quotes**

**QUOTE INFORMATION**

+1.116

Quote Information

Quote #1004  
 Quote Date: 07/16/2019 16:24:41 PDT  
 Expiry Date: No expiry  
 Thank you for requesting a quote. Below is a summary of the quote details

Requester

First Name: Lisa  
 Additional Information  
 Last Name: Larkin  
 Email Address: llarkin@miva.com  
 Phone Number: 858-490-2570  
 Zip/Postal Code: 92127  
 Country: US  
 Comment:

Code	Product	Qty.	Price	Total
dress5	Batik print dress	1	\$41.00	\$41.00
			Total:	\$41.00

[Add quote to basket](#)

Request a change for Quote #1004

Request:

Notes Date added

Submit

**Figure 28:** Quote Information screen

If the customer wants to accept the quote, they can do so by clicking the “Add quote to basket” link (see **Figure 27**). This changes the quote status to “Accepted” and allows the customer to purchase the items in the quote at the custom prices you quoted for them.

**Manage Quotes**

Manage Quotes

None Search Quotes... + ↺

-Quote #	Date	First Name	Last Name	Email	Expires	Status	Total
1004	7/16/2019, 4:24:41 PM	Lisa	Larkin	llarkin@miva.com	Never	Accepted	\$41.00

**Figure 29:** Quote Accepted

If the customer wants to request a change for the quote, they can type their request in the **Request** TextArea field and click “Submit”.

Comment:

Code	Product
dress5	Batik print dress

Request a change for Quote #1004

Request:

**Figure 30:** Customer requests a change

When they do so, their request is added to the Quote Notes and the quote status changes to “Response Needed”.

Code	Product	Qty.	Price	Total
dress5	Batik print dress	1	\$41.00	\$41.00
			Total:	\$41.00

[Add quote to basket](#)

Request a change for Quote #1004

Request:

Notes	Date added
C Is this dress available in blue?	07/17/2019 11:09:29 PDT

**Figure 31:** Change request added to Notes

When you view the quote from the Manage Quotes screen and click on the “Notes” link, the customer’s new note appears at the top of the list.

Notes for Quote 1004

Search Records...

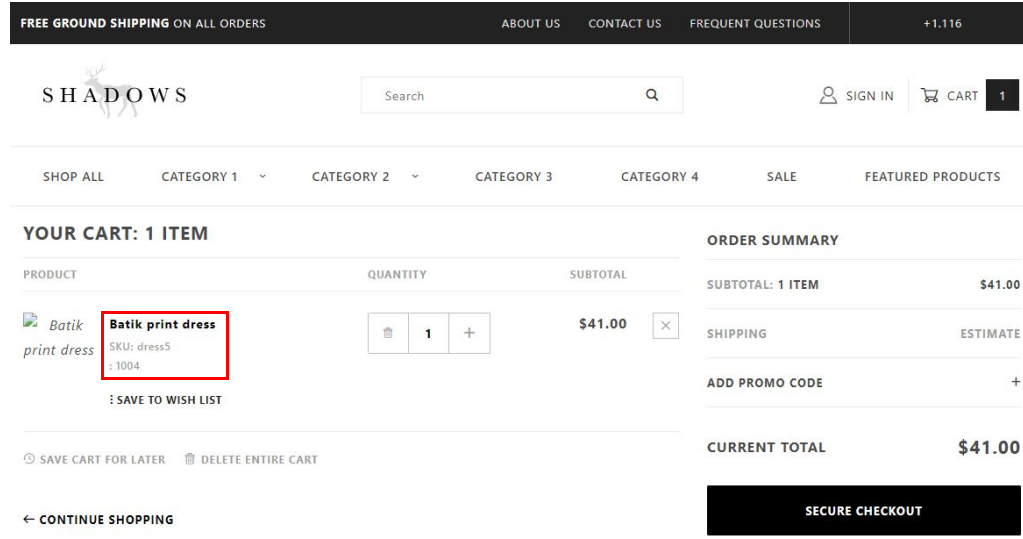
Public	Note #	Quote #	Note	Source
<input checked="" type="checkbox"/>	10	1004	Is this dress available in blue?	Customer
<input type="checkbox"/>	8	1004	Quote Converted to Order #1001	Administrator
<input type="checkbox"/>	4	1004	Quote Copied to Quote #1005	Administrator
<input type="checkbox"/>	3	1004	Quote Sent to Customer	Administrator

Showing 1-4 of 4

**Figure 32:** Notes for Quote dialog

## Miva Merchant Working with Quotes

When quote items are added to the cart, an attribute is automatically applied to them to denote that they were purchased from a quote.



The screenshot shows a shopping cart interface for 'SHADOWS'. The cart contains one item: 'Batik print dress' with SKU: dress5:1004. The subtotal is \$41.00. The order summary shows a subtotal of \$41.00, shipping estimate, and a current total of \$41.00. A 'SECURE CHECKOUT' button is visible.

PRODUCT	QUANTITY	SUBTOTAL
Batik print dress SKU: dress5:1004	1	\$41.00

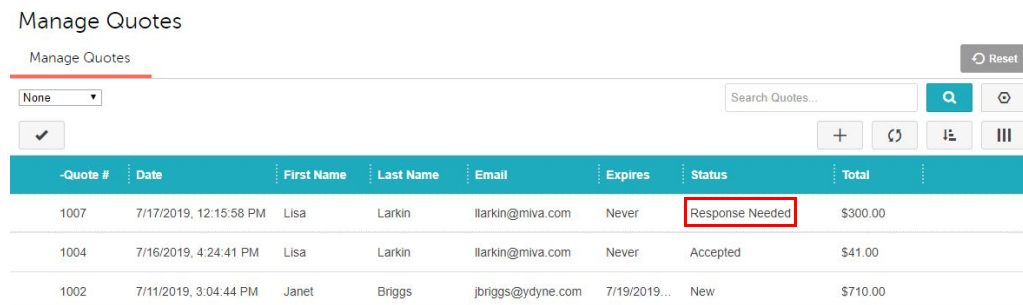
ORDER SUMMARY	
SUBTOTAL: 1 ITEM	\$41.00
SHIPPING	ESTIMATE
ADD PROMO CODE	+
CURRENT TOTAL	\$41.00

Figure 33: Cart with quote item

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

The settings that allow customers to change quantities or remove quote items are on the **Quote Configuration** screen in **Utility Settings**. See [Quote Configuration on page 10](#) for details on this screen.

When a customer adds a comment to a quote, it changes the quote status to “Response Needed”.



The screenshot shows the 'Manage Quotes' interface. A table lists quotes with columns: Quote #, Date, First Name, Last Name, Email, Expires, Status, and Total. The quote with ID 1007 has a status of 'Response Needed'.

Quote #	Date	First Name	Last Name	Email	Expires	Status	Total
1007	7/17/2019, 12:15:58 PM	Lisa	Larkin	llarkin@miva.com	Never	Response Needed	\$300.00
1004	7/16/2019, 4:24:41 PM	Lisa	Larkin	llarkin@miva.com	Never	Accepted	\$41.00
1002	7/11/2019, 3:04:44 PM	Janet	Briggs	jbriggs@ydyne.com	7/19/2019...	New	\$710.00

Figure 34: Quote with status “Response Needed”

You can respond to the question by adding a public note to the quote within the Miva admin. To do so, click on the **+** (Add Note) button from the Notes dialog.



Notes for Quote 1007

Search Records...

Public	Note #	Quote #	Note	Source
<input checked="" type="checkbox"/>	13	1007	Does this come in petite?	Customer
<input type="checkbox"/>	12	1007	Quote Sent to Customer	Administrator

Figure 35: Notes dialog

The Add Note dialog appears. Write your note in the text box and click “Add”.

Home > Manage Quotes

## Manage Quotes

Manage Quotes

#1007 Response Needed

Lisa Larkin

\$300.00

---

#1004 Accepted

Lisa Larkin

\$41.00

---

#1002 New

Janet Briggs

\$710.00

---

#1001 New

Janet Briggs

\$200.00

---

#1000 New

\$0.00

Notes for Quote 1007

Search Records...

**Add Note** ✕

This dress is available in petite and regular sizes.

Showing 1-2 of 2

Figure 36: Add Note dialog

You want to make sure it is a public note so the customer can see it. From the Notes for Quote dialog, make sure the slider button () in the Public column is ‘on’ (blue).

---

## Miva Merchant

### Excluding Quotes from Price Groups

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Public	Note #	Quote #	Note	Source
<input checked="" type="checkbox"/>	14	1007	This dress is available in petite and regular si...	Administrator
<input checked="" type="checkbox"/>	13	1007	Does this come in petite?	Customer
<input type="checkbox"/>	12	1007	Quote Sent to Customer	Administrator

Showing 1-3 of 3

Close

**Figure 37:** Notes for Quote dialog

On the Quote Information page, the Notes appear as shown in **Figure 37**.

Request a change for Quote #1007

Request:

Submit

Add quote to basket

Notes	Date added
A This dress is available in petite and regular sizes.	07/17/2019 12:42:10 PDT
C Does this come in petite?	07/17/2019 12:20:03 PDT

**Figure 38:** Notes section – Quote Information page

The abbreviations to the left of the notes indicate the source of each note:

- A – Administrator response
- C – Customer question



These abbreviations can be changed to any text you like via the page template.

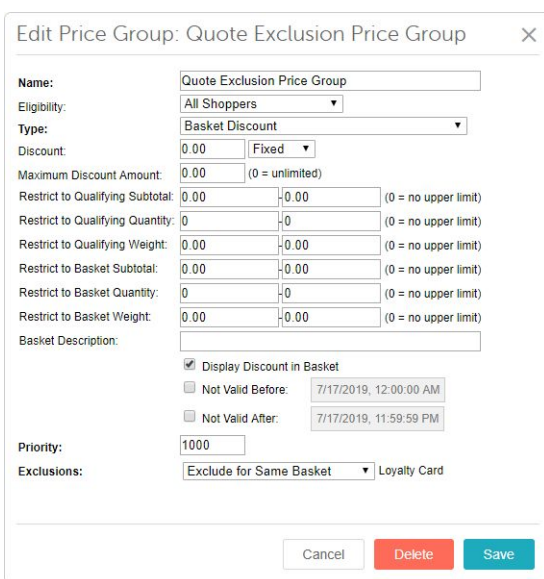
---

## Excluding Quotes from Price Groups

There is a special feature that 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 exclude quotes from a Price Group, create a Price Group with the name “Quote Exclusion Price Group”. Perform the following steps.

1. Go to  > **Marketing** > **Price Groups**.
2. Click on the  (Add Price Group) button.
3. When the Add Price Group dialog appears, type “Quote Exclusion Price Group” in the Name field.
4. If there are other Price Groups available, make sure to give a higher priority to the Quote Exclusion Price Group.
5. Set which other Price Groups you want to exclude.



**Edit Price Group: Quote Exclusion Price Group** [X]

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:

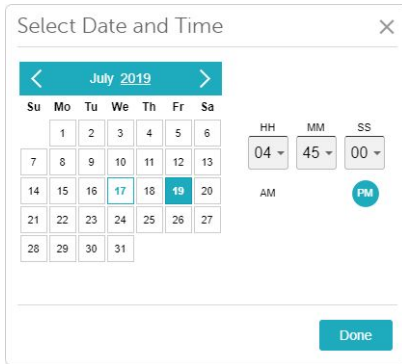
Priority:

Exclusions:

Figure 39: Edit Price Group dialog

## Quote Expiration and Follow Up Emails

You can set a unique expiration date for every quote. From the View Quote screen, click on the date field under the “Expiry” heading. The Select Date and Time dialog appears.

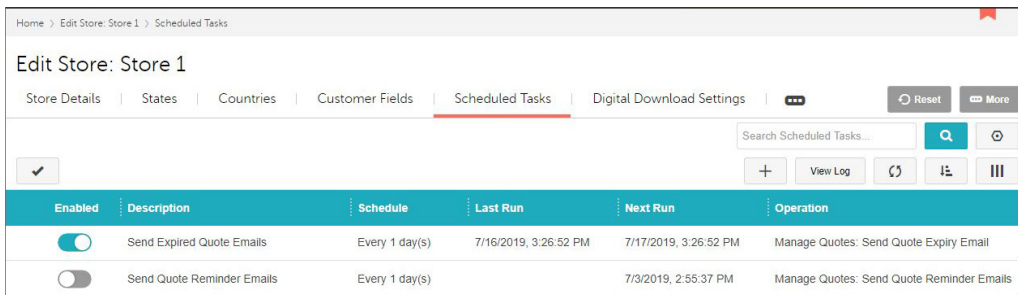


**Figure 40:** Select Date and Time dialog

The customer sees the expiration date in the emails they receive as well as the quote detail page. Once the quote expires, the customer will not be able to accept the quote and complete checkout.

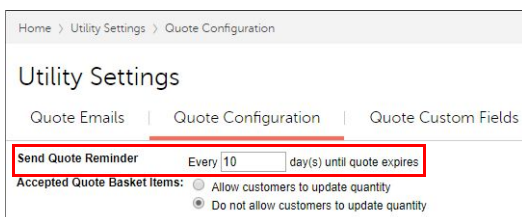
## Quote Reminder and Expired Quote Emails

Two scheduled tasks are automatically created when the Manage Quotes module is installed.



**Figure 41:** Scheduled Tasks screen

- **Send Expired Quote Emails** – Notifies the customer when their quote expires (enabled by default).
- **Send Quote Reminder Emails** – Sends the customer a reminder email every X days until the quote expires. This task is disabled by default and you will have to turn it on if you want to use it. The settings are located on the Quote Configuration tab under Utilities. The default setting is every 10 days.



**Figure 42:** Send Quote Reminder option