See the way Request a Quote for Magento 2 extension works.

# Ultimate Guide for Magento 2 Request a Quote

Boost sales revenue by understanding and meeting customer demand with Magento 2 Quote. Strengthen your competitive position with the personalized purchasing offer.

- · Create quotes in one click from product or category pages
- · Let customers request quotes for unlimited products quantity
- Provide individualized pricing based on customer details
- Efficiently manage all requests on a quotations grid
- · Negotiate over the prices in a convenient way
- Convert Magento 2 quotes into orders in a few simple steps
- Hide prices for specific products or whole categories
- WCAG compliance (for Luma and Hyvä Theme)

Explore our internal **Knowledge Base** to gain even more valuable insights and uncover answers to popular questions about the configuration and features of the Magento 2 Request a Quote extension. The Request a Quote extension is compatible with **Hyvä Theme**. To enable the Hyva compatibility please install the 'amasty/module-request-quote-hyva' and 'amasty/module-hide-price-hyva' packages from composer suggest.

To enable the Hyva compatibility for Request a Quote Pro version, please also install the packages 'amasty/module-request-quote-pro-functionality-hyva' and 'amasty/module-quote-attributes-hyva' from composer suggest. Note, that the Hyva compatibility is available as part of an active product subscription or Support Subscription.

The extension is compatible with **Hyvä Checkout**. You can find the 'amasty/module-request-quotehyva-checkout' package for installing in composer suggest (Note: the compatibility is available as a part of an active product subscription or support subscription)

# **General Settings**

To configure general settings, go to Stores  $\rightarrow$  Configuration  $\rightarrow$  Amasty Extensions  $\rightarrow$  Request a Quote.

#### **General Tab**

The extension allows to choose specific customer groups that will be able to request quotes and create them from product or category pages. It also allows to disable quotation for specific product categories.

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General		
Enable 'Request a Quote' [store view]	Yes	Ŧ
Frontend Quote URL Key [store view]	quote	
	Specified URL Key will be used for the Quote Cart ({url_key}/cart/) and 'My Quotes' ({url_key}/account/) pages on the frontend.	
'Add to Quote' button on Product Page [store view]	Show	•
'Add to Quote' button on Category Page [store view]	Show	•
Disable Quotation for Categories [store view]	Watches	•
	Video Download     Sale 'Add to Quote' button will be hidden for each product from the selected categories. This sett	▼ //
Allow Quote Request for Customer	applied to product list and product page.	
Groups [store view]	Not Logged In General	Î
	Retailer Wholesale	•
	If 'Not Logged In' option is chosen, please specify whether or not customer account should b created for guest automatically when the quote is submitted.	be
Auto-Create Customer Account When Guest Submit New Quote [store view]	Yes	•

**Enable 'Request a Quote'** - set to Yes to enable the extension.

**Frontend Quote URL Key** - with this setting you can customize the URL key for the Quote Cart ({url\_key}/cart/) and 'My Quotes' ({url\_key}/account/) pages on the frontend, in order to link this URL exclusively to your store.

**'Add to Quote' button on Product Page** - *Show* 'Add to Quote' button if you want your customers to be able to add products to quote cart right from the product page. If not, *Hide* the button.

**'Add to Quote' button on Category Page** - *Show* 'Add to Quote' button if you want to let your customers add products to quote requests from the category page. If not, *Hide* the button.

**Disable Quotation for Categories** - specify product categories for which quote requests will be disabled. 'Add to Quote' button will be hidden for each product from the selected categories.

**Allow Quote Request for Customer Groups** - specify the customer groups to allow quote requests.

If 'Not Logged In' option is chosen, guest users will insert email addresses upon quote submission and accounts will be created automatically.

**Auto-Create Customer Account When Guest Submit New Quote** - this setting becomes available when the 'Not Logged In' option in the 'Allow Quote Request for Customer Groups' setting is chosen. If set to 'Yes', when a guest submits a quote, a customer account will be created for them automatically. If you disable automatic creation, the guest can still submit a quote, but it cannot be converted into an order by either the guest or the website administrator.

Note, that all necessary for registration fields from the Stores  $\rightarrow$  Configuration  $\rightarrow$  Customers  $\rightarrow$  Customer Configuration  $\rightarrow$  Name and Address Options will also be shown on the quote cart for unregistered users. This way, all the customer information will be collected.

Also, if you are using Magento Commerce, you can create additional Customer Attributes (Stores  $\rightarrow$  Attributes  $\rightarrow$  Customer) for unregistered users, which will be displayed in the quote request form and will be saved in a Customer Account.

🚫 LUMA				Search ent	ire store here Q	] <mark>H</mark> 2 🦮
What's New Wome	n Men Gear Training Sale					
Quote Ca	rt				Quote Summa	ry
ltem		Price	Qty	Subtotal	Subtotal Tax	\$107.00 \$0.00
	Montana Wind Jacket	\$ 45.00	1	\$45.00	Quote Total	\$107.00
	Size: L				Enter your det	ails
3 19	I would also buy a vellow jacket.				Email Address *	
	the same size				veronica@example.co	m (?)
				e 🖉	Remarks	
	Taurus Elements Shell	\$ 62.00	1	\$62.00	I'd buy these products give me a discount.	if you could
17	Size: 5				First Name *	
	Do you have the size L 2				Veronica	
-	bo you have the size E !				Last Name *	
	<i>li</i>			A =	Harris	
				Ø 🔟	Submit O	uote
			Clear Quote	Update Quote		

If 'Not Logged In' option is not chosen you will be proposed to fill in the following fields:

Allow Quote Request for Customer Groups	Not Logged In	
[store view]	General	
	Wholesale	
	Retailer	
	If 'Not Logged In' option is chosen, guest users will insert email addresses upon quote submission and accounts will be created automatically.	
Inform Guests [store view]	Yes 🔹	
	Show 'Login for quote' button for guests	
Button Text [store view]	Login for quote	

In such a case, guest visitors will be asked to log in to add products to quote.



Allow to change Price in Quote Cart - set 'No' to disable price changing for customers in Quote Cart. Automatic quote approval will be disabled as well. The feature is useful in case a customer wants to ask for a duscount and get a quote for Magento 2 order, but doesn't know exactly what price to set.

quote before approving.

If Amasty Hide Price is enabled, a customer will see the price as N/A. In the admin panel, the quote will be submitted with 0 price. Please make sure to check the quote before approving.

Approve Quotes Automatically [store view]	Yes	•
	Set 'Yes' to approve quote automatically if the overall discour is less than certain % amount	nt
if Quote Discount is Less than (%) [store view]	10	
	The discount is calculated for the entire quote (not for separ products). Note: discount calculation is based on prices excluding tax.	ate
Cost Attribute [store view]	cost	•
	Empty	
	cost	
	msrp	
	price	
	special_price	
	tier_price	
	weight	

**Approve Quotes Automatically** - this option allows you to approve quotes automatically if the discount of the submitted quote is less than the specified percentage amount.

**if Quote Discount is Less than (%)** - specify the discount percentage amount for automatic quotes approving. The discount is calculated for the entire quote (not for separate products). Note: discount calculation is based on prices excluding tax.

**Cost Attribute** - choose which attribute will be used as 'Cost' attribute. This option will make the decision-making process easier (whether approve or not the quote), because admin will see the difference between requested price and product's cost.

Apply Discounts on Approved Quote Items [store view]	Yes  If enabled, cart price rules will be applied to the approved quote, and the application of discount codes will also become possible.
Cost Attribute [store view]	price 💌
Add Estimate Shipping Block to Quote Cart [store view]	Yes
Label for Custom Shipping Method [store view]	Custom Fee Specify the name of custom shipping method.

**Apply Discounts on Approved Quote Items** - this functionality is available only in **PRO version** as a part of an active product subscription or support subscription. It allows to apply Cart Price Rules, Discounts and Discount Codes to approved Quote items.

**Add Estimate Shipping Block to Quote Cart** - this functionality is available only in **PRO version** as a part of an active product subscription or support subscription. It allows for adding Estimate Shipping Block to the Quote Cart.

Please note that in the Quote Cart, the Estimate Shipping block is used for informational purposes, allowing the buyer to estimate the approximate cost of shipping to their region. Therefore, despite the possible shipping methods and rates being displayed when filling out the Estimate Shipping fields, this block is not taken into account in further calculations (when moving items from the quote to the cart and subsequently purchasing them). During checkout, the buyer will need to select the appropriate shipping method again in the cart.

Here is an example how the Esimate Shipping block looks on the frontend in the customer quote cart:

Quote Cart

Item		Price	Qty	Subtotal	Quote Summ	ary
	Abominable Hoodie Size: M Color: Blue Add Note	\$ 69,00	1	\$69.00	Estimate Shipping and Enter your destination shipping estimate. Country United States State/Province	d Tax ^ to get a
_	Regument Summit Kit	\$ 42.00	4		Arizona Zip/Postal Code	~
	Size: M Color: Yellow Add Note	\$ 42,00		\$ <del>4</del> 2.00	Flat Rate Fixed \$5.00 Best Way Table Rate \$10.00	
		Clear Qu	ote Up	n 💼	Subtotal	\$111.00 \$10.00
					Fixed)	\$121.00

And in admin panel:

2025/08/04 23:00	9/59		Ultima	ate Guide for Magento 2 Request a Quote
Additional Info	rmation			
Job Position				Other
Phone Number				+659812652644
Quote Total				
Remarks for thi	s Quote		Quote Totals	
Estimated Shipp	oing Info		Subtotal	\$111.00
United States, Michigan, 49628-7978			Tax	\$9.16
		•	Grand Total	\$120.16

Label for Custom Shipping Method - here you can specify the label for custom shipping method.

#### **Expiration & Reminder Tab**

The extension allows to set default expiration period for quote requests.

#### **Expiration & Reminder**



**Quote Expiration** - Set default period in days for quote to be valid once approved. For zero and higher this value can be set for each quote individually. Keep empty to disable Magento quote lifetime.

**Send Reminder Email after Day(s)** - Set default period in days to send reminder once quote approved. For zero and higher this value can be set for each quote individually. Keep empty to disable reminder.

#### **Admin Notifications**

With the extension it is possible to configure different notification emails. Admin will get email reports with new quote requests.

#### Admin Notifications



**Send Email Reports for New Quote Requests** - Choose the option to enable emails to admin with the quote requests that have been recently created or updated. You can notify your admins **instantly** or set a **custom** notification schedule.

**Frequency** - If a *custom* option is chosen, set the necessary frequency: notify admins **Daily**, **Weekly** or **Monthly**.

Start Time - customize the particular time for notifications.

Admin Email Address - Input an email address, the extension will send notifications to.

**Email Template to Notify Admin** - Select the appropriate template for the email notifications.

**Email Sender** - specify your company's email from which the notifications will be sent.

#### **Customer Notifications**

Customers will get notifications when their quotes are created, modified, accepted or expired. Also choose **Email Templates** to notify you customers that their quote has been **Submitted**, **Approved**, **Modified**, **Cancelled** or **Expired**.

#### **Customer Notifications**

Send Email Notifications to Customers [store view]	Yes	•
	[	
Disable Notification for [store view]	Submitted Quote	
	Approved Quote	
	Modified Quote	
	Canceled Quote	
	Expired Quote	
	Reminder	
		11
Email Template for Submitted Quote [store view]	Submitted Quote Customer Notification (Default)	•
Email Template for Approved Quote [store view]	Approved Quote Customer Notification (Default)	•
Email Template for Modified Quote [store view]	Modified Quote Customer Notification (Default)	•
Email Template for Canceled Quote [store view]	Canceled Quote Customer Notification (Default)	•
Email Template for Expired Quote [store view]	Expired Quote Customer Notification (Default)	•
Email Template for Reminder [store view]	Reminder Quote Customer Notification (Default)	•
Email Sender [store view]	General Contact	•

**Disable Notification for** - here you can disable particular triggers used to send notifications to customers about admin actions with a quote, so as not to overwhelm them with too many notification emails.

For the **Pro version** of the extension, you can also adjust whether you want to send notifications for quotes created by the admin.

#### **Customer Notifications**

Send Email Notifications to Customers [store view]	Yes	•
Disable Medification for		
[store view]	Submitted Quote	
	Approved Quote	
	Modified Quote	
	Canceled Quote	
	Expired Quote	
	Reminder	
	Created by Admin Quote	

In this tab, you can specify the templates for Submitted Quote, Approved Quote, Modified Quote, Cancelled Quote, Expired Quote, Reminder and also set Email Sender contact for the emails with notifications for registered customers. For the **Pro version** of the extension, you can also set the template for notifications related to quotes created by the admin.

Email Template for Expired Quote [store view]	Expired Quote Customer Notification (Default)	•
Email Template for Reminder [store view]	Reminder Quote Customer Notification (Default)	•
Email Template for Created by Admin Quote [store view]	Created by Admin Quote Customer Notification (Defaul	•
Email Sender [store view]	General Contact	•

With the extension you can also specify the **notification email templates for the Not Logged In users**. If previously, in the General configuration settings you've chosen to allow quote requests for Not Logged in Customers, but disabled auto-creating customer accounts for guests:

2025/08/04 23:00	13/5	Ultimate Guide for	r Magento 2 Request a Quote
Allow Quote Custo	Request for mer Groups [store view]	Not Logged In General	
		Retailer Wholesale	-
		'Not Logged In' option is chosen, please specify whether or not custon reated for guest automatically when the quote is submitted.	ner account should be
Auto-Create Custor When Guest Submit	ner Account	No	•

in such a case additional fieldset displays in Customer Notifications section:

#### **Customer Notifications**

[store view]

Send Email Notifications to Customers [store view]	Yes	•
Disable Notification for [store view]	Modified Quote	•
	Canceled Quote	
	Expired Quote	_
$\mathbf{X}$	Reminder	11

○ Not Logged In Customers Notifications

Email Template for Submitted Quote [store view]	Submitted Quote Guest Notificatic	•
Email Template for Approved Quote [store view]	Approved Quote Guest Notificatio	•
Email Template for Modified Quote [store view]	Modified Quote Guest Notification	•
Email Template for Canceled Quote [store view]	Canceled Quote Guest Notificatior	•

Here you can specify the templates for Submitted Quote, Approved Quote, Modified Quote and Cancelled Quote for the emails which will be sent to Not Logged In users.

To create templates, go to Stores  $\rightarrow$  Marketing  $\rightarrow$  Communications  $\rightarrow$  Email Templates.

#### PDF

The quotes can be downloaded in PDF format both from backend and frontend. In addition, you can automatically attach PDF to the Approved Quote customer notification and configure PDF content according to your needs on the store view level.

#### PDF

To use PDF functionality, please install the library dompdf/dompdf. To do this, run the command "composer require dompdf/dompdf" in the main site folder.

Automatically Attach PDF File to Approved Quote Notification	Yes	•	
[sector state]			
Template Content [store view]	@vars {     "var customer_telephone raw":"Customer's     phone number"     "var shipping_telephone raw":"Shipping     phone number"     "var store_phone raw":"Store phone     number"     "var quote_expiry_date raw":"Date of a     quote has expired"     "var shipping_method raw":"Shipping     method"     "var has_shipping_info raw":"Has Shipping     Info"     } @	•	Ø
	<pre><!DOCTYPE html PUBLIC "-//W3C//DTD XHTML 1.0 Strict//EN" "http://www.w3.org/TR/xhtml1/DTD/xhtml1- strict.dtd">     <html< pre=""></html<></pre>	•	

You can use the following **variables** in the PDF template of the quote:

- Admin Quote Remarks admin\_quote\_remarks
- Billing Company Name billing\_company\_name
- Username username
- Customer Email customer\_email
- Customer Street customer\_street
- Customer Region customer\_region
- Customer Postcode customer\_postcode
- Customer Country customer\_country
- Customer Telephone customer\_telephone
- Customer Quote Remarks customer\_quote\_remarks
- Quote Number quote\_number
- Quote Status quote\_status
- Quote Date quote\_date
- Quote Expiry Date quote\_expiry\_date
- Has Shipping Info has\_shipping\_info
- Shipping Street shipping\_street
- Shipping City shipping\_city
- Shipping Company Name shipping\_company\_name

#### <u>a</u>masty

- Shipping Region shipping\_region
- Shipping Postcode shipping\_postcode
- Shipping Country shipping\_country
- Shipping Telephone shipping\_telephone
- Shipping Method shipping\_method
- Product Grid product\_grid
- Store Phone store\_phone
- Quote Submitted Date quote\_submitted\_date

To use PDF functionality, please install the library dompdf/dompdf. To do this, run the command "composer require dompdf/dompdf" in the main site folder.

```
-sh-4.2$ composer require dompdf/dompdf
Using version ^0.8.3 for dompdf/dompdf
./composer.json has been updated
Loading composer repositories with package information
Updating dependencies (including require-dev)
Package operations: 4 installs, 0 updates, 0 removals

Installing sabberworm/php-css-parser (8.3.0): Downloading (100%)
Installing phenx/php-svg-lib (v0.3.3): Downloading (100%)
Installing phenx/php-font-lib (0.5.1): Downloading (100%)
Installing dompdf/dompdf (v0.8.3): Downloading (100%)
Installing dompdf/dompdf (v0.8.3): Downloading (100%)

Package phpunit/phpunit-mock-objects is abandoned, you should avoid using it. No replacement was suggested.
Writing lock file
Generating autoload files
```

# **Quote Requests Management**

From the admin panel your can see and manage all the request quotes in a convenient grid, accept/reject a quote or suggest a new best-suited price.

Go to Stores → Sales → Amasty Request a Quote → Quotes.

Quo	otes							1	demouser 🔻
							Cr	reate Nev	v Quote
			<b>Y</b> Filters	•	O Default	View 🔻	🔅 Colum	ns 🔻 🖡	🛓 Export 🔻
Action	ns 🔺 7 r se	records found (2 lected)			20 •	per page	<	1	of 1 >
Close	ove	Purchase Point	Purchase Date	t	Status	Grand Total	Grand Total (Base)	Action	Expiry Date
	100000016	Main Website Main Website Store Default Store View	Apr 15, 2019 9:10:17 AM		Expired	\$43.30	\$43.30	View	2019-04-23 00:00:00
	100000012	Main Website Main Website Store Default Store View	Apr 15, 2019 9:04:18 AM		Expired	\$81.19	\$81.19	View	2019-04-25 09:05:08
	100000007	Main Website Main Website Store Default Store View	Mar 4, 2019 10:52:45 AM		Complete	\$30.00	\$30.00	View	N/A
✓	100000005	Main Website Main Website Store Default Store View	Mar 4, 2019 10:44:21 AM		Canceled	\$21.65	\$21.65	View	N/A

You can see the ID of the quotes, their Purchase point, Purchase Date, Status and Grand Totals.

To *Approve* or *Cancel/Close* several quotes in one click, tick them and choose the necessary action in the **Actions** dropdown menu.

Click **View** to see detailed information about quote requests. You can *Edit* and *Approve* the quotes with *Pending* status.

Click **Create New Quote** to create a quote on behalf of customer. After approving a quote it will be visible at customer account page, in 'My Quotes' section.

# **Usage Example**

To manage all the quotes properly, let's consider an example of a particular quote management from the very beginning.

#### Step 1. Creating a Quote by a Customer

First, your customers create quotes from the product or category pages via **Add to Quote** button.



The module allows displaying 'Add To Quote' button for custom product types.

Also, customers can move items to quote straight from their Shopping Cart via 'Request a Quote' button.



Then they go to their **Quote Carts** to view and edit their quote requests.

🔿 luma	Search entire store here Q
What's New Women Men Gear	2 Items in Cart Cart Subtotal : \$73.00
Home > Women > Tops > Bras & Tanks > Ar	My Quote Cart
	Leah Yoga Top See Details ∨ \$39.00 Qty: 1
	Antonia Racer Tank See Details ~ \$34.00 Qty: 1 / final fill fill fill fill fill fill fill fi
	Add to Cart Add to Quote

Magento 2 Quote Extension allows your customers request a quote for unlimited products quantity.

There customers specify the price they want to request, items quantity, add some notes that describe their requests in the *Remarks* field and **Submit Quote**.

If you allowed 'Not Logged In' users to create quotes, they will have to provide additional details before quote submission:

🚫 LUMA	Search entire store here Q
What's New Women Men Gear Training Sale	2
Quote Cart	Quote Summary
Item Price Qty Subto	Subtotal         \$77.00           Tax         \$0.00
Olivia 1/4 \$ 70.00 3 \$77. Zip Light Excl. Tax Jacket Size: S Color: Blue Add Note	.00 Quote Total \$77.00 Enter your details Email Address * guest_user@example.com
Clear Quote Update Quot	Remarks I'll buy 3 items at once if you could reduce the price to 70\$. Thanks! First Name * Peter Last Name * Brown
	Submit Quote

Online buyers are also able to **Add Notes** per item, **Clear Quotes** and **Update Quotes** right from the cart.

# Quote Cart

Item		Price	Qty	Subtotal	Quote
2	Antonia Racer Tank	<b>30.00</b> Excl. Tax	3	\$34.00	Summary Subtotal \$73.00 Tax \$6.02
	Color: Black Please, send me your size chart in PDF format, if possible.				Quote Total \$79.02 Enter your details
					Remarks
				Ø 💼	l'll purchase 3 Antonia Racer Tanks and 5
	Leah Yoga Top Size: M Color: Purple Add Note	\$ 30.00 Excl. Tax	5	\$39.00	Leah Yoga Tops if you give it prices of 30\$ for each item.
				Ø 💼	
		Clear Quot	e Upd	late Quote	

Magento 2 Quote Extension allows shoppers to request quotes for Simple, Configurable,

Downloadable, Virtual, Grouped and Bundle product types.

If a customer edits products in a Quote Cart, previous items are removed and replaced with the new ones together with new values. Thus, keep in mind, that the previous custom price is not saved.

## Step 2. Managing a Quote from the Admin Panel

When the quote has been submitted, you will immediately see it on the grid with the *Pending* status.

Quo	otes					<b>1</b> c	demouser 🔻
		<b>T</b> Filter	rs 💿 Defau	t View 🔻	🔅 Colum	ns 🗸 🚺	Export 🔻
Actio.	🔻 6 re	cords found	20 🔻	per page	<	1 0	of 1 >
	ID	Purchase Point	Purchase Date 1	Status	Grand Total	Grand Total (Base)	Action
	100000012	Main Website Main Website Store Default Store View	Mar 11, 2019 11:42:35 AM	Pending	\$259.80	\$259.80	View

Click **View** to see the detailed quote information. You can *Approve*, *Edit* the quote or *Download PDF* copy of it.

#10000000	)24						
← Bacl	k Car	ncel / Close	Арр	prove	Down	lload PDF	Edit
Quote & Account Information							
Quote # 100000	0024			Accoun	t Inform	ation Edit (	Customer
Quote Date	Sep 5, 201	19, 1:15:39 PM		Custom	er Name	Vero	nica Costello
Quote Date (UTC)	Sep 5, 2019, 1:14:04 PM			Email		roni_cost@e	example.com
Status	Pending			Custom	er Group		General
Created From	Main Website			Account	Created	Mar 11, 2018	3, 4:24:23 PM
	Defa	Default Store View		Orders 1	Total		\$76.03
Placed from IP	Placed from IP 213.184.226.82						
Product	Cost	Product Price	e (Excl. Ta)	<) Q	uote Price	Qty	Row Total
Maya Tunic SKU: WT07-S-Yellow	\$20.00	\$29.00		\$2	23.00	1	\$23.00
Nora Practice Tank	\$23.00	\$39.00		\$3	30.00	1	\$30.00
SKU: WT03-M-Purple							
Quote Total							
Remarks for this Quote				Quote 1	Totals		
				Subtota	I		\$53.00
				Grand T	otal		\$57.37

Here all the information about the customer and the quote request is displayed.

**Product Price** displays a real price at the store. Customer's request is shown in the **Price** column. **Row Total** is also displayed according to customer's price.

Also, it is possible to request quotes for products with tier pricing. In this case, the extension takes tier pricing into account and automatically offers best price for your customers. If a user wants to quote for a lower price, you can check the **Tier Price** and the suggested by a customer price in one

place.

## Quote Items

Product	Cost	Price (Excl. Tax)	Qty
Affirm Water Bottle SKU: 24-UG06	\$7.00	\$7.00 Tier Pricing 10 for \$5.00 3.00	10
Total 1 product(s)	Subtotal:		\$30.00
Additional 0.00 Discount (%)	Additiona Surcharg	al 0.00	

View the information about a customer and easily evaluate when the account was created and how much has the customer spent during that time.

Hit the **Approve** button if the quote terms are satisfactory for you. You can also *Edit* the quote if needed.

## Edit Quote

	← Back	Save Quote
Quote & Account Information		

# Quote # 1000000024

Quote Date	Sep 5, 2019, 1:14:04 PM
Status	Approved
Expiry Date	Mon, 16 Sep 20' 🛗
Reminder Date	Wed, 11 Sep 20' 🧱
Created From	Main Website Main Website Store Default Store View

Account Information	Edit Customer
Customer Name	Veronica Costello
Email	roni_cost@example.com
Customer Group	General
Account Created	Mar 11, 2018, 4:24:23 PM
Orders Total	\$76.03

Add Products

#### Quote Items

Product	Cost	Price (Excl. Tax)	Qty	Subtotal	Row Subtotal	Action
Maya Tunic SKU: WT07-S- Yellow Configure	\$29.00	\$29.00 21.85	1	Excl. Tax: \$21.85 Incl. Tax: \$23.65	Excl. Tax: \$21.85 Incl. Tax: \$23.65	Please selet
Nora Practice Tank SKU: WT03-M- Purple <b>Configure</b>	\$39.00	\$39.00 28.50	1	Excl. Tax: \$28.50 Incl. Tax: \$30.85	Excl. Tax: \$28.50 Incl. Tax: \$30.85	Please selet 💌
Total 2 product(s)	Subtotal:		\$50.35	\$50.35		
Applied disco	unt: 5%	Remove discount				
Additional Discount (%)	5.00	Additional 0.00			Update	Items and Quantities

#### Quote Total

Remarks

#### Remarks for this Quote

Hi Veronica, we can offer you a 5% discount.

0	110	to	To	+ -	
- U	uo	Le	10	Ld	IS.
_	_	_			

Subtotal	\$50.35
Shipping & Handling	\$0.00
Тах	\$4.15
Grand Total	\$54.50



Note, that you can set the **Expiry** and **Reminder** date only after the quote was **Approved**. Other options can be edited either before you approve the quote or after that.

Edit products' **Price** and **Quantity** in the appropriate fields, set **Expiry** and **Reminder** date, leave **Remarks**.

Apply **Additional Discount/Surcharge** to the quote. Insert a percent number of discount/surcharge and it will be applied to the whole quote.

If you don't want to offer a special price for some particular product, remove it in one click via **Action** dropdown menu.

To edit products' size and color, press the **Configure** button.



Quantity

3

With the extension you are also able to add products to your customers' quotes. Click **Add Products**.

Choose the products to add. The configuration field where you can specify the size, color and quantity will be displayed automatically.

Please sele	ct products		Add Selecte	d Product(s)	to Quote
Search R	eset Filter 2045 reco	rds found 20 🔻 per pa	ge <	1 of 1	03
ID	1 Product	sku	Price	Select	Quantity
			From To	Any 🔻	
2046	Configure Set of Sprite Yoga Straps	24- WG085_Group			
2045	Configure Erika Running Short	WSH12	45.00	✓	3
2044	Erika Running Short-32- Red	WSH12-32-Red	\$45.00		

#### Click Add Selected Product(s) to Quote.

Check in advance on a **Product Page** that added items have **Inventory Source** specified for selected store view. If Inventory Source is not specified, the product cannot be displayed at the storefront, and it will also be impossible to create a quote both as customer and admin.

Click **Update Items and Quantities** to preview all the products and the subtotal of the quote. Provide a **Note** for the Quote to give a customer important or additional information about your offer.

In addition to this, it is possible to set custom shipping addresses, methods and custom fees right from the editing page. To do this, tick the Configure Shipping hitbox.

Configure Shipping			
Quote Total			
Remarks for this Qu Remarks	uote		

In the **Address Information** tab you can select one of the existing billing or shipping addresses or create new ones. Also, edit any customer info if needed.

Address Information		
Billing Address		Shipping Address
Select from existing customer addres	sses:	Same As Billing Address
Add New Address	•	Add New Address
Add New Address Veronica Costello, 6146 Honey Bluff	Parkway, Ca	lder, Michigan 49628-7978, United States
		Name Prefix
* First Name Veronica		* First Name
Middle Name/Initial		Middle Name/Initial
eed to the Shipping Information sec Shipping Information	ction.	
Shipping Method *		
Flat Rate		
Flat Rate Fixed - \$10.00		
Flat Rate Fixed - \$10.00 Best Way		

Custom

O Custom Fee - \$ 12.00

Chosen Shipping Address and Method are allowed to be modified on checkout

Here you can select one of the preconfigured shipping methods or set a custom fee for delivery. Allow or disallow chosen Shipping Address and Method to be modified on checkout.

#### Save Quote and then Approve it.

After the approval, you are able to **convert a quote to order** without leaving the page.

#100000	0012						💄 de	mouser 🔻
	← Back	Cancel / C	lose	Convert To (	Order	Download	I PDF	Edit
✓ You approv	ved the quote.							
QUOTE VIEW		Quote & A	ccount li	nformatior				
Information		Quote # 100000012		Account Information Edit Customer				
1					Edit Cu	stomer		
		Quote Date	Mar 11, 2	019, 11:42:35 AM	Edit Cu Custor Name	stomer mer	Veronica	Costello
		Quote Date Status	Mar 11, 2	019, 11:42:35 AM Approved	Edit Cu Custor Name Email	ner ropi c	Veronica ost@exan	Costello
		Quote Date Status Created From	Mar 11, 2 I Main V Defau	019, 11:42:35 AM Approved Main Website Website Store ult Store View	Edit Cu Custor Name Email Custor Group	stomer mer roni_c mer	Veronica ost@exan	Costello nple.com General

#### Step 3. Quote Confirmation

Customers can easily track and manage quote requests in their accounts. In **My Quotes** tab the **ID**, **Date**, **Quote Total**, **Status** and **Expiry Date** for each quote will be displayed.

# My Quotes

Quote #	Date	Quote Total	Status	Expiry Date	Action
100000022	8/28/19	\$64.95	Approved	Sep 7, 2019	View   Move to Cart
100000016	4/15/19	\$43.30	Expired	Apr 23, 2019	View
100000012	4/15/19	\$81.19	Expired	Apr 25, 2019	View
100000011	3/4/19	\$81.19	Expired	Apr 28, 2019	View
100000005	3/4/19	\$21.65	Canceled	N/A	View
100000004	3/4/19	\$64.95	Canceled	N/A	View
6 ltem(s)					Show 10 v per page

If a quote is approved by the admin, the customer can **Move to Cart** all the products right from the grid.

If the quote was moved to cart by mistake, it can be easily removed from cart. In such a case, it returns to the quotes grid in customer account.

Customers can also **View Quotes** details and **Download PDF** version of quotes.

# Quote # 100000028

Creation Date: September 5, 2019

Expiry Date: September 15, 2019 at 1:42:35 PM UTC

#### Download PDF

Product Name	SKU	Original Price	Requested Price	Approved Price	Qty	Discount Amount	Subtotal
Bolo Sport Watch	24- WG01	\$49.00	\$38.00	\$41.16	1	\$7.84 (16.00%)	\$41.16
Cruise Dual Analog Watch	24- MG05	\$55.00	\$47.00	\$48.02	1	\$6.98 (12.69%)	\$48.02
						Subtotal	\$89.18
						Shipping & Handling	\$0.00
						Tax	\$7.36
						Grand Total	\$96.54

EXPIRED

#### Remarks

Administrator Remarks: Additional Discount in amount of 2% was applied.

If the suggested terms of the quote are not acceptable, the customer can **Cancel** the request.

In case the offered prices are satisfactory, the customer is able to **Move to Shopping Cart** or directly **Move to Checkout** all products with the custom prices in one click.

Customers are not allowed to edit a quote once it has been submitted.

You will see the Complete or Canceled Status on the grid in your admin panel.

#### Creating a Quote by Admin

Store admin can create a quote from the **Quotes** grid, using the **Create New Quote** button.

# Quotes

						Cre	ate New Quote
			<b>Y</b> Filters	<ul> <li>Default</li> </ul>	:View 👻 ጰ	Columns	▼ 🛃 Export ▼
Action	ns 🔻	12 records found		20 🔹	per page	< .	1 of1 >
	ID	Purchase Point	Purchase Date 1	Status	Grand Total	Action	Expiry Date
	ID 1000000035	Purchase Point Main Website Main Website Store Default Store View	Purchase Date 1 Apr 1, 2020 9:28:20 AM	Status Pending	Grand Total \$30.00	Action View	Expiry Date

Choose a customer from the grid or create a new one using the button.

# Edit Quote #000000055

						~	Back		
Please select a customer Create New Cus									
Search	Reset Filter	5 records found		20 💌	per page <	1 of	1 >		
id t	Name	Email	Phone	ZIP/Post Code	Country	State/Province	Signed- up Point		
					All Countries 💌				
3	Anna White	anna@example.com	(5895) 2369-5689	2365-8965	United States	New York	Default Store View		
2	John Harris	john@example.com	(2565) 2563-5698	2365-5698	United Kingdom		Default Store View		
1	Veronica Costello	roni_cost@example.com	(555) 229- 3326	49628- 7978	United States	Michigan	Default Store View		

Select the necessary store for order to create.

# Edit Quote #000000057

		Cancel
Please select a store		
Main Website	?	
Main Website Store		
Main Website Store	O Default Store View	
French Website		
French Store		
French Store	O French Store View	

It's possible to create quote in admin panel for a customer from any store view (even if he/she doesn't belong to the corresponding website). The customer will be duplicated to the necessary store.

Edit Quote #						⊥ demouser ▾
					Cancel	Submit Quote
Quote Currency:	ltems Qi	uoted				Add Products
US Dollar 🔹	Product	Price	Qty	Subtotal	Row Subtotal	Action
	Account	Informat	ion			
	* Group	*	Email			
	General	•	eva_green@	example.com		
	* Tax/VAT N	Number				
	5589847					
	Name Prefi	х				
	* First Nam	ne				
	Eva					

On this step you can add product to quote, adjust prices add edit the necessary customer info.

Also, admin users can create quote themselves right from the orders grid.

To do this, go to **Admin Panel**  $\rightarrow$  **Sales**  $\rightarrow$  **Orders**.

Choose the order and click **Select** button in the *Actions* column. **Clone as Quote** option will appear.

# Ordors

Ord	ers						L	demouser 👻
							Create N	ew Order
Search	h by keyword		Q	<b>F</b> ilters	<ul> <li>Default Vi</li> </ul>	ew 🔹 🔅	Columns 🔻	🏝 Export ▼
Action	15 🔹	3 records foun	d		20 <b>•</b> p	er page	۲. (۱	of 1 >
	ID	Purchase Point	Purchase † Date	Grand Total (Base)	Grand Total (Purchased)	Status	Action	Signifyd Guarantee Decision
	00000003	Main Website Main Website Store Default Store View	Mar 4, 2019 11:07:31 AM	\$30.00	\$30.00	Pending	Select 🔺 View Clone as Qu	ote
	00000002	Main Website Main Website Store Default Store View	Mar 11, 2018 4:24:43 PM	\$39.64	\$39.64	Closed	Select 💌	

Now it is possible to edit the price and the quantity.

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Items Quoted					Add Products
Product	Price (Excl. Tax)	Qty	Subtotal	Row Subtotal	Action
Iris Workout Top SKU: WS03-XS-Red Configure	\$29.00 Custom Price* 27.55	1	\$27.55	\$27.55	Please selei 👻
Total 1 product(s)	Subtotal:		\$27.55	\$27.55	
* - Enter custom price exclu	uding tax				
Applied discount: 5%	Remove disco	ount			
Additional 5.00 Discount (%)	Additional Surcharge (9	0.00		Upd	ate Items and Quantities

# **Hide Price**

Magento 2 Request a Quote extension is preintegrated with **Hide Price** package. It provides you with the capability to use all Hide Price benefits according to your needs: disable ordering, hide prices for particular products or customer groups, etc. which will bring even more involving of potential buyers into pricing negotiations.



#### **General Settings**

To configure Hide Price settings go to **Stores**  $\rightarrow$  **Configuration**  $\rightarrow$  **Amasty Extensions**  $\rightarrow$  **Hide Price**:

To run the module on Magento 2.3, Zend DOM package should be installed. Please, run the following command in the SSH: composer require zendframework/zend-dom

#### **General Settings**

Enable Extension [store view]	Yes	•
	Choose 'Yes' to hide the price for the selected product categories and customer groups	
Hide Price for Selected Group(s) [store view]	NONE	
	NOT LOGGED IN	
	General	
	Wholesale	
	Retailer	
	Product price will be hidden for the selected customer groups only	
Hide Price for Selected Category(s) [store view]	NONE	•
	Root Catalog	
	Default Category	
	Gear	
	Bags	
	Fitness Equipment	
	Watches	
	Collections	
	New Luma Yoga Collection	
	Training	*
	L	- 11

Enable Extension - set the option to 'Yes' to activate the extension.

**Hide Price for Selected Group(s)** - select a customer group (groups) for which the prices in selected above categories will be hidden.

**Hide Price for Selected Category(s)** - select a category (categories) in which all product prices will be hidden.

If you don't want to hide prices or Add to Cart buttons for whole categories you can easily hide them

for specific products. Simply open the necessary product page here **Products**  $\rightarrow$  **Catalog** and disable price (or buttons) visibility. Here you can also specify a customer groups to apply this settings.

Joust Duffle Bag		← Back	Add Attribute	Save 🔻
Gift Options				
Hide Price 🖌				
Display Price Mode [store view]	Show -			
Hide "Add to Cart"	Yes	•		
[store view]	Default Config	his product. Note	e: selecting	
	No	tton settings from	n the module's	
	Yes	Add to Cart" opt	ion. After	
	Replace with custom button	Cart" setting as	needed.	
Affected Customer Groups	NONE			
[store view]	NOT LOGGED IN			
	General			
	Retailer			
	Wholesale			
	If 'Default Config' is selected for 'Displa the 'Hide Price for Selected Group(s)' se	y Price Mode' or 'Hid etting from the modu setting	le "Add to Cart"', Jle's general	

The extension now **also hides Tier Price information** when the product price is hidden.

If you hide prices for whole product categories and customer groups, you can exclude specific products and customers from the price display limitation.

Do not Apply to Product ID's [store view]	12 Specify comma separated product id's to show the price for. This setting has the maximum priority
Do not Apply to Customer ID's [store view]	1134, 1116 Specify comma separated customer id's to show price for. This setting has the maximum priority
Email Sender for Admin Reply Email [store view]	General Contact 🔹
Email Template for Admin Reply Email [store view]	Amasty Hide Price Auto Reply (Defau Email template chosen based on theme fallback when "Default" option is selected

**Don't Apply to Product ID's** - specify product ID's to which price display limitations won't be applied.

**Don't Apply to Customer ID's** - specify customer ID's to which price display limitations won't be applied.

The following email settings will be used when a store administrator replies to a customer quote request via email.

**Email Sender for Admin Reply** - select a sender contact for store admin notifications.

Email Template for Admin Reply - select an email template for admin notifications.

#### **Hide Price Options**

Hide Price [store view]	Yes	*
Hide "Add to Cart" [store view]	Yes	•
	Hide 'Add to Cart' or replace it with the cust button, e.g. 'Sign up' or 'Get a Quote'	tom
Hide "Add to Wishlist" [store view]	Yes	*
	Hide wishlist link when price is hidden	
Hide "Add to Compare" [store view]	Yes	•
	Hide compare link when price is hidden	

If the price is configured to be hidden, the customer will not see this price in quote cart as well.

Hide Price - enable the option to hide prices for selected products or product categories.

Hide Add to Cart - set the option to 'Yes' to remove the "Add to Cart" button.

Hide Add to Wishlist - This setting lets you hide/display the "Add to Wishlist" option.

Hide Add to Compare - Enable/disable adding products to the comparison.

You can let shoppers add products to wishlists and compare even when their price is hidden.

#### **Frontend Options**

#### **Frontend Options**

Hide Price Text [store view]	Contact us
	Display the above text when price is hidden, e.g. 'Call for Price'
Custom CSS Styles for Hide Price Link [store view]	font-size: 16px;background: #eeeeee; display: inline-block;border: 1px solid #cccccc; color: #333333;cursor: pointer;display: inline-block;padding: 7px 15px;font-size: 1.4rem; line-height: 1.6rem:
Upload Image [store view]	Choose File No file chosen Show the uploaded image instead of price
Link Url	AmastyHidePricePopup
[store view]	Use text 'AmastyHidePricePopup' for opening Ajax Popup with a 'Get a Quote' form. Insert the page URL to redirect customers to any page you need

**Hide Price Text** - specify a custom text that will be used for a custom button instead of the "Add to Cart" option.

**Custom CSS Styles for "Hide Price Link"** - you can customize the button display (which is used instead of "Add to Cart").

Upload an Image - upload any image you need to show it instead of a price.

**Link URL** - by default we've already specified a "Get a Quote" form code here (once a customer clicks on a custom button the form will be shown), but you can insert any link you need to redirect customers to the necessary store page.

Below you'll see the example of a 'Hide Price' popup.

Get a Quote for Driven Backpack
Customer Name *
Veronica Costello
Customer Email *
roni_cost@example.com
Phone Number *
1 419-422-0787
Comment
Hi, could you please tell me Driven Backpack price? I'd buy 5 of them if the price is not higher than \$65.
Submit

Add **Magento 2 Custom Form** to create custom quote request forms of various types, specifying additional information you need to generate a special price offering. Use a handy constructor to generate multiple forms in no time and customize each form to meet your needs.



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#### **Admin Email Notifications**

The module lets you notify admin users about new 'Get a Quote' requests via email.

Admin Email Notifications		
Send Email to [store view]	admin@example.com Leave Empty to Disable Notifications	
Email Sender [store view]	General Contact	•
Email Template [store view]	Amasty Hide Price Admin Notificatio Email template chosen based on theme fallba when "Default" option is selected	<b>▼</b> ck

**Send Email to** - specify an email address to which a new quote request notification will be sent. Leave Empty to Disable Notifications.

**Email Sender** - select an email sender contact.

**Email Template** - select an email template that will be used for admin user notifications.

#### **Auto Reply Email Options**

Use auto-replies to quote requests to inform customers that their request is delivered and is being processed.

Auto Reply Email Options		
Enable [store view]	Yes	•
Email Sender [store view]	General Contact	•
Email Template	Amasty Hide Price Auto Reply (Defau	•
[store view]	Email template chosen based on theme fallba when "Default" option is selected	ck

**Enable** - set to 'Yes' to activate the Auto-reply option.

Email Sender - select an email contact form which auto-replies will be sent.

**Email Template** - select an email template that will be used for auto-replies.

Please view Magento 2 Hide Price User Guide for more details.

# **Custom Quote Fields (available in Request a Quote Pro)**

With the Request a Quote Pro extension you can add various types of custom fields to quotes in order to gather additional information about your customers and their requests.

To view and manage quote custom fields, please navigate to **Sales** → **Amasty Request a Quote** → **Custom Quote Fields**:

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# **Custom Quote Fields**

						Add New F	ield
		0		<b>Filter</b>	s Default View	- 🖨 Col	umns 👻
Search by keyword	d	Q					
3 records found				20 -	per page <	1 of 1	>
Code ↓	Label	Туре	Store View	Required	Show on Quotes Grid	Sort Order	Action
company_name	Company Name	Text Field	All Store Views	No	Yes	1	Edit
job_position	Job Position	Dropdown	All Store Views	No	Yes	2	Edit
phone_number	Phone Number	Text Field	All Store Views	Yes	No	3	Edit

To add a new custom field, click the **Add New Field** button.

New Quote Field	1				👤 demouser 👻
	•	+ Back	Reset	Save and Continue Edi	t Save
General 🗡					0
Attribute Label	* Job Position				
Attribute Code	* position For internal use. Must be un letters and underscores. It is or uppercase letters since it behavior.	nique with no sp is not recommer t may cause unw	aces. Please us ided to use digi anted issues of	e only lowercase its, other symbols, r undesired	
Store Views	* All Store Views Main Website Main Website Store Default Store View	<ul> <li>✓</li> </ul>			
Input Type	Dropdown				
Required	Ves				

Specify the Attribute Label, Attribute Code and the Store View for the custom field.

**Required** - Set to 'Yes' to make the field required.

**Input Type** - choose the input type for your custom field. For now, the following input types are available: Text Field, Text Area, Date, Dropdown, Yes/No, Multiple Select, File Upload.

Input Type	Dropdown
1 31	Text Field
Required	Text Area
	Date
	Dropdown
	Yes/No
	Multiple Select
	File Upload in *

For the 'Text Field' and 'Date' input types you can also adjust Default Value, Input Validation and Input/Output Filter settings.

Input Type	Text Field 🔹
Required	Ves Ves
Default Value	
Input Validation	None
Input/Output Filter	None 💌

You can add multiple values for the 'Dropdown' and 'Multiple Select' input types.

0

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	LIOC	
va	lues	

Is Default	Admin *		Default Store View		
. 0	Sales M	anager	Sales Manager		Î
. •	Procure	ment Specialist	Procurement Specialis	t	Î
Add Value					
Field Configuration	1 /				$\odot$
Add to Column Op	otions	Yes			
	1	Select "Yes" to add this field to the list of colum grid.	in options on the quotes		
Use in Filter Op	otions	Ves			
	1	Select "Yes" to add this field to the list of filter of	options on the quotes grid.		
Sort (	Order	2			
		Position of attribute on quote pages		1	
Manage Titles (Size	e, Color,	etc.) 📝			$\odot$
Default Store	View	Job Position			
Default Store		Jos Costion			

Add to Column Options - Select "Yes" to add the field to the list of column options on the quotes grid.

Use in Filter Options - Select "Yes" to add the field to the list of filter options on the quotes grid.

Sort Order - Here you can adjust the position of the field on quote pages.

For the '**File Upload' input type** you can also adjust Allowed File Extensions (the following types are supported: csv, png, pdf, jpg, jpeg, xls, xlsx) and Max File Size (by default it is set to 2).

_	 -			
ELO	C 0	n tia		tion
FIE			ula	
	~ ~			

Add to Column Options	No Select "Yes" to add this field to the list of column options on the quotes grid.
Sort Order	0 Position of attribute on quote pages
Allowed File Extensions	csv, png, pdf, jpg, jpeg, xls, xlsx Comma-separated file types. Unspecified file types will not be supported for upload. If left empty, the following types are supported: csv, png, pdf, jpg, jpeg, xls, xlsx.
Max File Size	2 Specify the maximum allowable file upload size in MB. If left empty, the default maximum file size is set to 2 MB.

Please note that the file size limit is also determined by the PHP configuration. These settings must be aligned; if the value set here exceeds the PHP limit, the PHP configuration will override it and enforce its maximum limit.

See how custom fields will look on the quotes grid:

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📩 Export 🔻

of 1

1

# Quotes **Create New Quote Filters** Default View • 🔅 Columns 🔻 11 records found Actions ٠ 20 ٠ per page

ID †	Purchase Date	Status	Grand Total	Grand Total (Base)	Expiry Date	Action	Company Name	Job Position
100000026	Dec 7, 2021 12:37:21 PM	Approved	\$274	\$274.00	Dec 17, 2021 12:39:22 PM	View	Watches & Bags	Managing Director
100000020	Dec 7, 2021 11:54:32 AM	Approved	\$31	\$31.00	Dec 31, 2021 3:00:00 AM	View	Everyday Fitness	Procurement Specialist
100000019	Dec 7, 2021 11:49:49 AM	Approved	\$399	\$399.00	Jan 11, 2022 3:00:00 AM	View	StylishBags	Business Development Specialist
1000000016	Dec 7, 2021 11:46:09 AM	Approved	\$1,180	\$1,180.00	Sep 20, 2022 3:00:00 AM	View	Jumbo	Sales Manager

Use custom fields in filtering on the quotes grid:

$\sim$				
Ο	u	0	te	25

Quotes			👤 demouser 🗸
			Create New Quote
		▼ Filters ● Default View ▼	🗸 🔅 Columns 🖌 📩 Export 🗸
Purchase Date	Grand Total	Grand Total (Base)	Expiry Date
from	from	from	from
to to	to	to	to
Purchase Point	ID	Status	Company Name 🔫 🗕
All Store Views 🗸		Approved	▼ Jumbo
ob Position			
Sales Manager 🗸 🗸	-		

And here is the storefront example of the quote with custom fields:

# Quote Summary

Subtotal	\$159.00
Тах	\$13.12
Quote Total	\$172.12
Enter your details	
Company Name	
Jumbo	
Job Position	
Procurement Specialist	~
Sales Manager	
Procurement Specialist	
Marketing Manager	
Store Owner	
Business Development Speci	alist
Business Analyst	
Managing Director	
Other	
Submit Quote	

# **Compatibility with AJAX Shopping Cart**

The extension is fully compatible with AJAX Shopping Cart.

Employ **Magento 2 AJAX Shopping Cart** to add more advanced options to your Request a Quote extension. For example:

• Show confirmation pop-up with the product info

Circe Hooded Ice Fleece	Eos V	Eos V-Neck Hoodiehas been added to your quote cartOr gry • 1 •Or gry • 1 •There are 4 items in your quote cart. Cart Subtotal: \$277.0	×
\$68.00	\$54.0	Continue(4) Quote Cart	\$39.00
XS S M L XL	XS		XS S M L XL

• Enable flying effect for add to the quote process to engage customers even more



• Let customers specify the options of the simple products right in a dialog window



• Show related products or cross-sells in the confirmation pop-up



# **Cron Tasks List**

Magento 2 Request a Quote extension is preintegrated with Cron Tasks List to provide store owners with an opportunity to track and manage all cron tasks running in the website background.

To view all scheduled and executed cron tasks, go to **System** → **Cron Tasks List** 

Run all cron tasks and generate their schedule by clicking the 'Run Cron' button. Also you can delete separate tasks in bulk, apply filtering and sorting options when it is needed.

#### Cron Tasks List

							Run Cron		
1 Last Cron Activity: 20 seconds ago									
					<b>Filter</b>	s 💿 Default View	🗸 🚯 Columns 🗸		
Actions   652 records found  20  records found  1 of 33									
×	ID	Job Code	Status †	Created At	Scheduled At	Executed At	Finished At		
	1038	sales_grid_order_shipment	SUCCESS	Mar 18, 2019 5:47:11 AM	Mar 18, 2019 5:47:00 AM	Mar 18, 2019 5:47:20 AM	Mar 18, 2019 5:47:20 AM		
	1058	sales_grid_creditmemo_async	SUCCESS	Mar 18, 2019 5:47:11 AM	Mar 18, 2019 5:47:00 AM	Mar 18, 2019 5:47:20 AM	Mar 18, 2019 5:47:20 AM		
	1078	sales_send_order_emails	SUCCESS	Mar 18, 2019 5:47:11 AM	Mar 18, 2019 5:47:00 AM	Mar 18, 2019 5:47:20 AM	Mar 18, 2019 5:47:20 AM		
	1098	sales_order_invoice_emails	SUCCESS	Mar 18, 2019 5:47:11 AM	Mar 18, 2019 5:47:00 AM	Mar 18, 2019 5:47:20 AM	Mar 18, 2019 5:47:20 AM		
	1118	sales_send_order_shipment	SUCCESS	Mar 18, 2019 5:47:11 AM	Mar 18, 2019 5:47:00 AM	Mar 18, 2019 5:47:20 AM	Mar 18, 2019 5:47:20 AM		
	1196	indexer_reindex_all_invalid	SUCCESS	Mar 18, 2019 5:47:13 AM	Mar 18, 2019 5:47:00 AM	Mar 18, 2019 5:47:21 AM	Mar 18, 2019 5:47:21 AM		
	1200	indexer_update_all_views	MISSED	Mar 18, 2019 5:47:13 AM	Mar 18, 2019 5:47:00 AM	Mar 18, 2019 5:47:21 AM	Mar 18, 2019 5:47:21 AM		
	1018	sales_grid_order_invoice_async	SUCCESS	Mar 18, 2019 5:47:11 AM	Mar 18, 2019 5:47:00 AM	Mar 18, 2019 5:47:20 AM	Mar 18, 2019 5:47:20 AM		
	1024	sales_grid_order_invoice_async	PENDING	Mar 18, 2019 5:47:11 AM	Mar 18, 2019 5:53:00 AM				
	1025	sales_grid_order_invoice_async	PENDING	Mar 18, 2019 5:47:11 AM	Mar 18, 2019 5:54:00 AM				

## **API Methods**

API methods allow admin to connect quote requests and proposals to and from other systems such as ERP and CRM.

The following methods are available:

amastyRequestQuoteRemarkServiceV1 Interface RemarkServiceInterface					
PUT /V1/amasty_quote/updateRemark					
amastyRequestQuoteQuoteRepositoryV1					
PUT /V1/amasty_quote/approve/{quoteId}					
<pre>PUT /V1/amasty_quote/expire/{quoteId}</pre>					
GET /V1/amasty_quote/search					
PUT /V1/amasty_quote/quote/note/customer:quoteId					
PUT /V1/amasty_quote/quote/note/admin:quoteId					
amastyRequestQuoteQuoteItemRepositoryV1 Interface QuoteItemRepositoryInterface					
PUT /V1/amasty_quote/quote_item/note/customer:quoteId					
PUT /V1/amasty_quote/quote_item/note/admin:quoteId					

#### For website administrator:

- "/V1/quote-carts/:quoteId" method="GET" to get the information about the quote cart
- "/V1/quote-carts" method="POST" to create a quote
- "/V1/customers/:customerId/quote-carts" method="POST" to create a quote for customer
- "/V1/quote-carts/:quoteId" method="PUT" to assign a quote to customer
- "/V1/quote-carts/:quoteId/cancel" method="PUT" to close a quote
- "/V1/quote-carts/:quoteld/items" method="GET" to get a quote items list
- "/V1/quote-carts/:quoteld/items" method="POST" to add an item to quote
- "/V1/quote-carts/:quoteld/items/:itemId" method="PUT" to update item data in the quote
- "/V1/quote-carts/:quoteId/items/:itemId" method="DELETE" to remove item from the quote

#### For registered customers

- "/V1/quote-carts/mine" method="POST" to create a quote
- "/V1/quote-carts/mine" method="GET" to get the information about the quote cart
- "/V1/quote-carts/:quoteId/in-cart" method="POST" to move the quote to cart
- "/V1/customers/quote-carts/:quoteld/cancel" method="PUT" to close the quote
- "/V1/quote-carts/mine/in-quote" method="POST" to move an item to quote
- "/V1/quote-carts/mine/update-customer-note" method="PUT"- to modify customer notification
- "/V1/quote-carts/mine/remove-from-cart" method="DELETE" to delete the quote from cart
- "/V1/quote-carts/mine/clear" method="DELETE" to delete the quote
- "/V1/quote-carts/mine/submit" method="PUT" to submit the quote

- "/V1/quote-carts/mine/items" method="GET" to get a list of items in the quote
- "/V1/quote-carts/mine/items" method="POST" to add an item to quote
- "/V1/quote-carts/mine/items/:itemId" method="PUT" to change an item in the quote
- "/V1/quote-carts/mine/items/:itemId" method="DELETE" to delete an item in the quote

#### For unregistered users:

- "/V1/guest-quote-carts" method="POST" to create a quote
- "/V1/guest-quote-carts/:quoteMaskId" method="GET" to get the information about the quote
- "/V1/guest-quote-carts/:cartMaskId/in-quote/:quoteMaskId" method="POST" to move items from cart to quote
- "/V1/guest-quote-carts/:quoteMaskId/update-customer-info" method="PUT" to edit guest information
- "/V1/guest-quote-carts/:quoteMaskId/update-customer-note" method="PUT" to modify guest notification for the quote
- "/V1/guest-quote-carts/:quoteMaskId/clear" method="DELETE" to delete the quote
- "/V1/guest-quote-carts/:quoteMaskId/submit" method="PUT" to submit the quote
- "/V1/guest-quote-carts/:quoteMaskId/items" method="GET" to retrieve the list of items in the quote
- "/V1/guest-quote-carts/:quoteMaskId/items" method="POST" to add an item to quote
- "/V1/guest-quote-carts/:quoteMaskId/items/:itemId" method="PUT" to change an item in the quote
- "/V1/guest-quote-carts/:quoteMaskId/items/:itemId" method="DELETE" to delete an item from the quote
- "/V1/amasty\_quote/isEmailAvailable/:customerEmail" method="GET" to get the guest's email

Now, using the endpoint "/V1/amasty\_quote/search method="GET"" you can get the information about

- administrator remarks
- administrator note
- customer remarks

Using API methods, you can **Get Quote**, **Approve Quote**, **Expire Quote**, **Add Quote Comment** and **Add Quote Item Note**.

PUT request - to update a particular quote;

GET request - to retrieve data from a server.

Please note, that through the API, admins can only only retrieve the quotes they have **created themselves**. Quotes created by customers on the front-end will not be available. In such cases, the module will display the error: "You don't have permission to access the quote with ID  $\{N\}$ ."

# Additional packages (provided in composer suggestions)

To make additional functionality available, please install the suggested packages you may need.

Available as a part of an active product **subscription** or support subscription:

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#### For Lite and Pro versions:

- **amasty/module-request-a-quote-graphql** Install module to activate GraphQl and Request a Quote integration.
- **amasty/module-request-quote-hyva** Install this module to activate the integration Request a Quote with Hyva Theme.
- **amasty/module-hide-price-hyva** Install this package to ensure Hide Price extension works with Hyva Theme (Hide Price extension included in Request a Quote Lite and Pro).
- **amasty/module-request-quote-hyva-checkout** Install this module to activate the integration Request a Quote with Hyva Checkout.
- **amasty/module-hide-price-add-to-cart-button** Install module for the ability to set the 'Add to Cart' button visibility at the product level.

#### For **Pro** tariff plan only:

- **amasty/module-request-quote-pro-functionality-hyva** Install this module to activate the integration Request a Quote Pro with Hyva Theme.
- **amasty/module-quote-attributes-hyva** Install this package to ensure the Quote Attributes extension works with the Hyva Theme.
- amasty/module-request-quote-discount-on-approved-quote Install this package in order to use 'Apply Discounts on Approved Quote Items' functionality.
- amasty/module-request-quote-pro-functionality Install this package for Quote Cart Estimate Shipping compatibility, to add a custom quote field type 'File Upload' and to have the possibility to notify the customers about the quotes created for them by admin.

# FAQ

• I want to change logo and text on the PDF in Request a quote plugin. How do I do that?

Find out how to install the Request a Quote for Magento 2 via Composer.

From: https://amasty.com/docs/ - Amasty Extensions FAQ

Permanent link: https://amasty.com/docs/doku.php?id=magento 2:request a quote

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