

Email Quote Pro extension User Manual



Magento Email Quote Pro extension allows you to get customers shopping cart in Email, prepare order quote from backend and Email the same quote to customers in Email.

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1. Extension Installation Guide

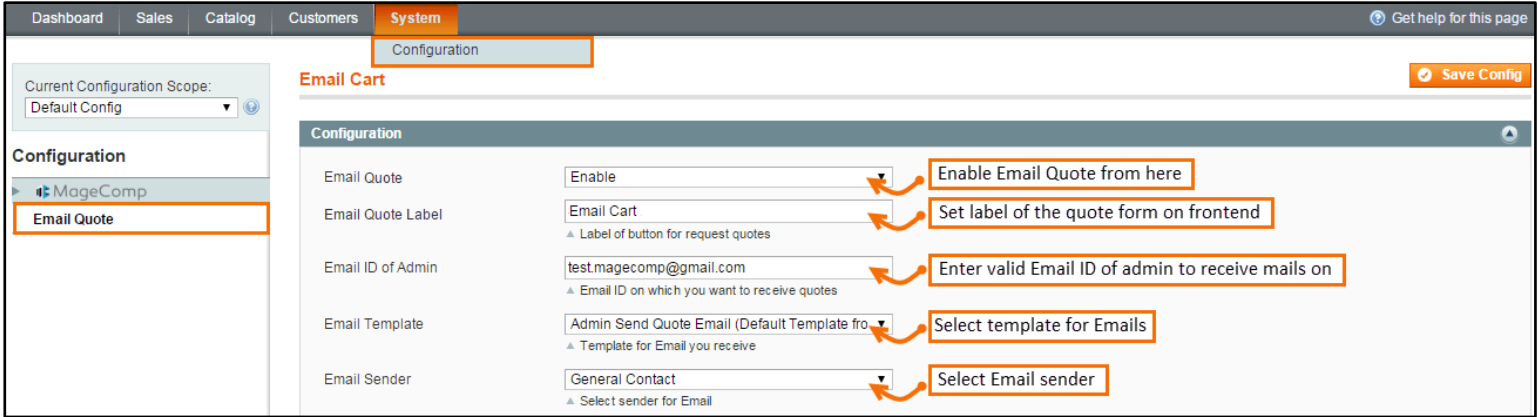
- Go to My downloadable products. The file that you download normally is a zip or tgz file.
- It's required to disable cache in the administration panel of your site. Go to System/Cache Management. Choose all caches and take action "Disable" then submit. Also disable the Compilation if it is ON. So, make sure that Caching and Compilation is disabled before installing the extension, you can enable it again after the installation.
- Use FTP client (such as Filezilla, WinSCP, cuteFtp) to upload or copy all folders in the zip package to your Magento site root folder. This will not overwrite any existing files, just add new files to the folder structure.
- You will need to install the extension in your custom theme if you are using. Just make sure about these files to be uploaded in custom theme.
- app/design/frontend/default/default to app/design/frontend/YourThemeFolder/PackageFolder
- skin/design/frontend/default/default to skin/design/frontend/YourThemeFolder/PackageFolder
- After uploading is done, enable the Cache and if you keep Compilation On then re-run the Compilation.
- Navigate to System/Configuration, if you can see the extension tab, it is installed properly.
- Now if you get Access denied error when click on the extension tab, you need to log out admin panel and log in again.
- Go to front-end and try to process, make sure that everything is OK.

2. Configuration

Once you have successfully installed the extension, go to **System → Configuration** to configure the extension for use. Here you can find various settings for the extension.

Email Quote Admin Configuration

- **Email Quote:** Option to enable or disable extension.
- **Email Quote Label:** Set label of the button for Email Quote Pro form on product page.
- **Email ID of Admin:** Enter a valid Email ID on which you want to receive mails.
- **Email Template:** Choose template for the Email you receive.
- **Email Sender:** Select sender of Email.



Email Cart Configuration

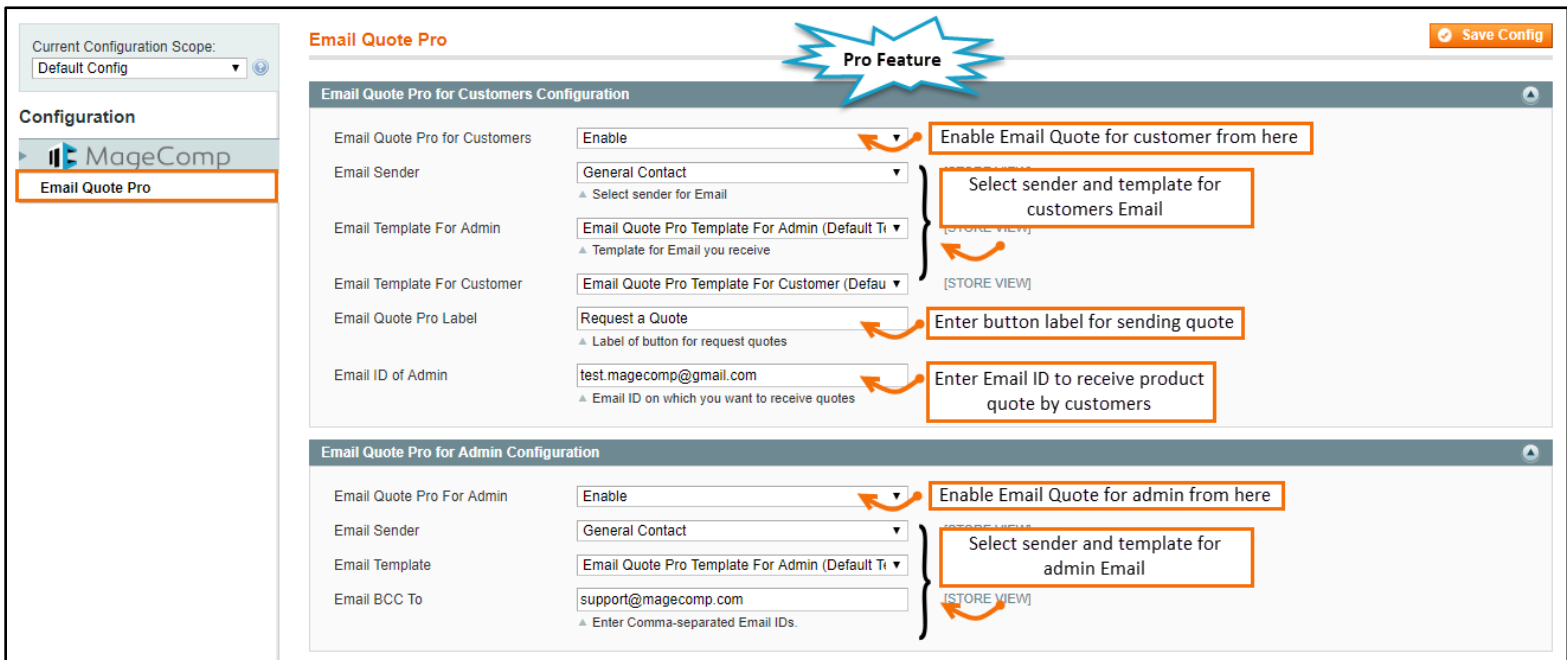
- Email Quote:** Enable (Enable Email Quote from here)
- Email Quote Label:** Email Cart (Set label of the quote form on frontend)
- Email ID of Admin:** test.magecomp@gmail.com (Enter valid Email ID of admin to receive mails on)
- Email Template:** Admin Send Quote Email (Default Template fro... (Select template for Emails)
- Email Sender:** General Contact (Select Email sender)

Email Quote Pro for Customers Configuration:

- **Email Quote for Customers:** Option to enable or disable Email Quote Pro for customers.
- **Email Sender:** Select sender of Email.
- **Email Template for Customer:** Choose template to send Email to customers.
- **Email Template for Admin:** Choose template to receive quote requests in Email.
- **Email Quote Pro Label:** Set label for Email quote button in backend.
- **Email ID of Admin:** Enter Email ID of admin to receive quotes in Email.

Email Quote Pro for Admin Configuration:

- **Email Quote for Admin:** Option to enable or disable Email Quote Pro for admin.
- **Email Sender:** Select sender of Email.
- **Email Template:** Choose template to receive quote requests in Email.
- **Email BCC To:** Enter Email ID to get business carbon copy.



Email Quote Pro Configuration

Email Quote Pro for Customers Configuration

- Email Quote Pro for Customers:** Enable (Enable Email Quote for customer from here)
- Email Sender:** General Contact (Select sender and template for customers Email)
- Email Template For Admin:** Email Quote Pro Template For Admin (Default Ti... (Select sender and template for customers Email)
- Email Template For Customer:** Email Quote Pro Template For Customer (Defau... (Select sender and template for customers Email)
- Email Quote Pro Label:** Request a Quote (Enter button label for sending quote)
- Email ID of Admin:** test.magecomp@gmail.com (Enter Email ID to receive product quote by customers)

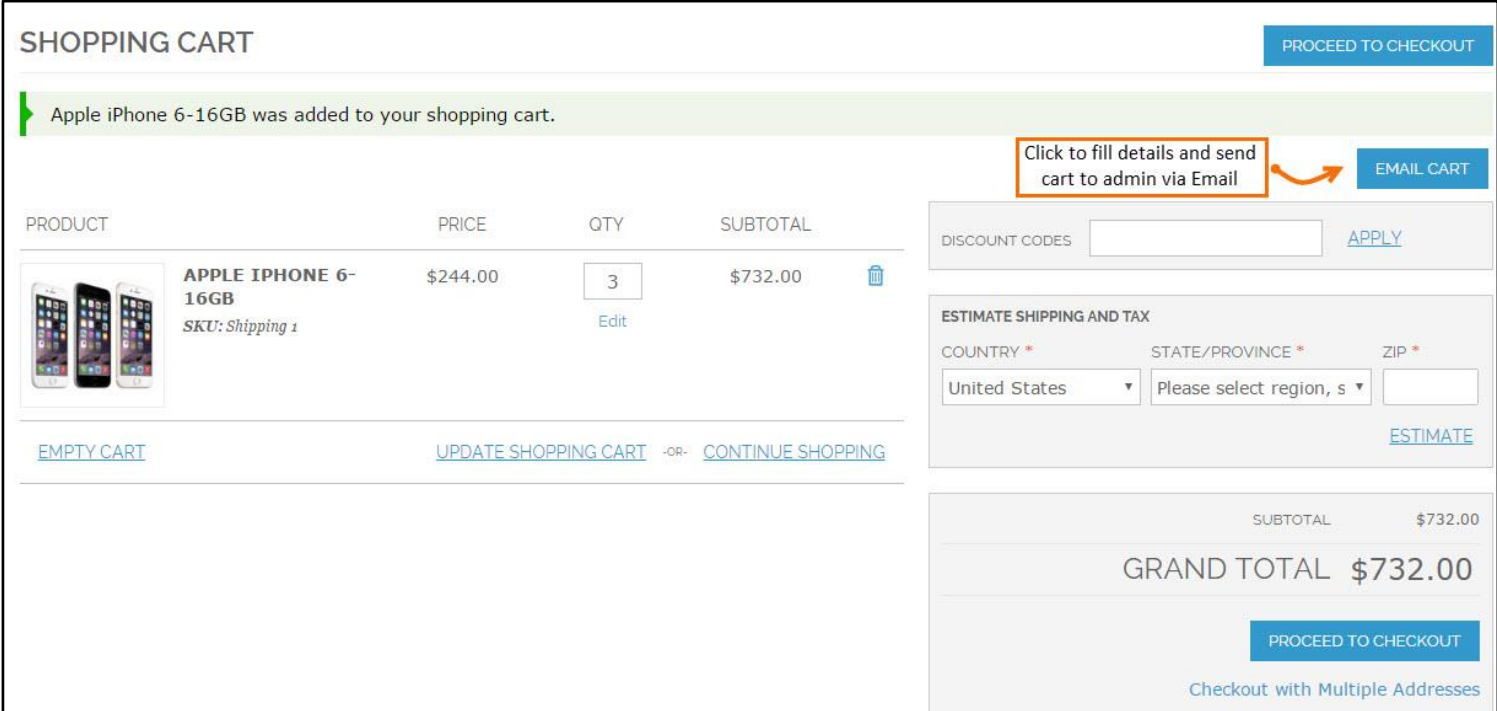
Email Quote Pro for Admin Configuration

- Email Quote Pro For Admin:** Enable (Enable Email Quote for admin from here)
- Email Sender:** General Contact (Select sender and template for admin Email)
- Email Template:** Email Quote Pro Template For Admin (Default Ti... (Select sender and template for admin Email)
- Email BCC To:** support@magecomp.com (Enter Comma-separated Email IDs.)

3. Email Quote Pro on Frontend

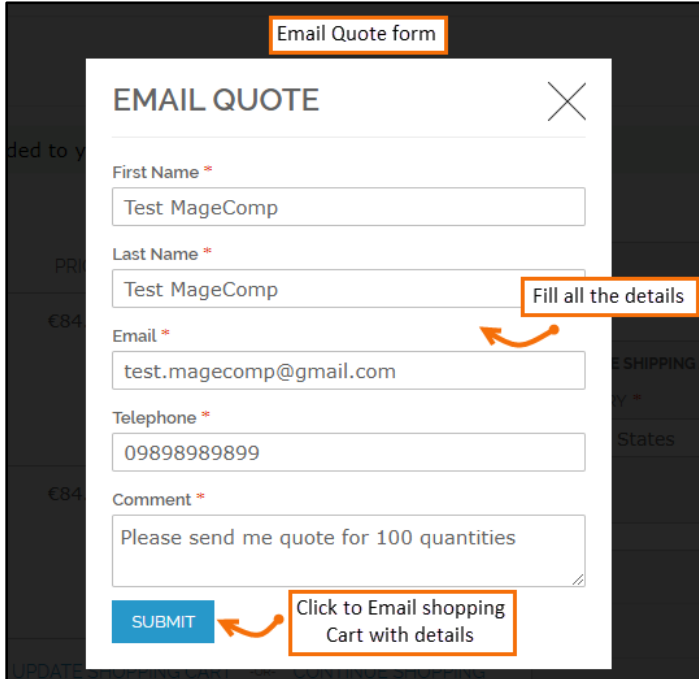
Once you save the configurations and settings, you can see Email Quote Pro enabled. Once customers choose all the options, quantities and add product to cart, Email Quote Pro button can be seen on cart page.

- **Email Quote Pro on cart page:**



The screenshot shows the 'SHOPPING CART' page. At the top right, there is a 'PROCEED TO CHECKOUT' button. Below the header, a green notification bar states 'Apple iPhone 6-16GB was added to your shopping cart.' In the main product list, the 'APPLE IPHONE 6-16GB' is shown with a quantity of 3 and a subtotal of \$732.00. To the right of the product list, there is an 'EMAIL CART' button. An orange callout box with an arrow points to this button, containing the text 'Click to fill details and send cart to admin via Email'. Below the product list, there are links for 'EMPTY CART', 'UPDATE SHOPPING CART', and 'CONTINUE SHOPPING'. On the right side, there is a section for 'ESTIMATE SHIPPING AND TAX' with dropdown menus for 'COUNTRY' (United States), 'STATE/PROVINCE' (Please select region, s), and 'ZIP'. Below this is an 'ESTIMATE' button. At the bottom right, the 'GRAND TOTAL' is \$732.00, with another 'PROCEED TO CHECKOUT' button and a link for 'Checkout with Multiple Addresses'.

- **Email Quote Pro form:** Once customers click on “Email Quote Pro” button, it open ups the form to fill up details and send shopping cart to admin via Email.



The screenshot shows the 'Email Quote' form. The form title is 'EMAIL QUOTE' with a close button (X) in the top right corner. The form contains several input fields: 'First Name *' (Test MageComp), 'Last Name *' (Test MageComp), 'Email *' (test.magecomp@gmail.com), 'Telephone *' (09898989899), and 'Comment *' (Please send me quote for 100 quantities). There is a 'SUBMIT' button at the bottom left. An orange callout box with an arrow points to the 'Email *' field, containing the text 'Fill all the details'. Another orange callout box with an arrow points to the 'SUBMIT' button, containing the text 'Click to Email shopping Cart with details'.

- **Email to admin:** Once customers submit the form, admin gets Email with whole shopping cart and form details.

Email to admin with shopping cart and form details of the customer

Hello Admin,


You Have Received New Quote Inquiry As Bellow.

Name : MageComp Test

Email : test.magecomp@gmail.com

Phone : 7990250277

Comment : Testing EMail Quote Functionality.

Photo	Item	Qty	Unit Price	Total
	Simple Product - Email Quote Pro	1	₹7,800.00	₹7,800.00

Shipping Rate : ₹325.00

Grand Total : 8,125.00

Thank you again

- **Email to Customers:** Once customers submit the quote request, they get quote successful submission Email with submitted quote.

Email Quote submission success Email to customer

Hello MageComp Test,


Thank you for submitting new quote at Main Website Store. We will get back to you soon with the order quote.

Name : MageComp Test

Email : test.magecomp@gmail.com

Phone : 7990250277

Comment : Testing EMail Quote Functionality.

Photo	Item	Qty	Unit Price	Total
	Simple Product - Email Quote Pro	1	₹7,800.00	₹7,800.00

Shipping Rate : ₹325.00


Grand Total : 8,125.00

Thank you again

4. Manage Email Quotes

Once Email Quote Pro is sent to customers, its details and status are stored in backend with information of customer name, Email, product SKU, grand total, create date and status. From here, admin can even edit the quote and send it again to the customers. Once the quote is edited and sent, it can be seen enlisted here.

- **Sent:** Shows When Admin Send Email Quote to customer but customer haven't clicked yet.
- **Clicked:** Shows When Customer clicks on Email Quote link.
- **Ordered:** Shows When Customer places an order using given email quote link.



Manage Email Quotes

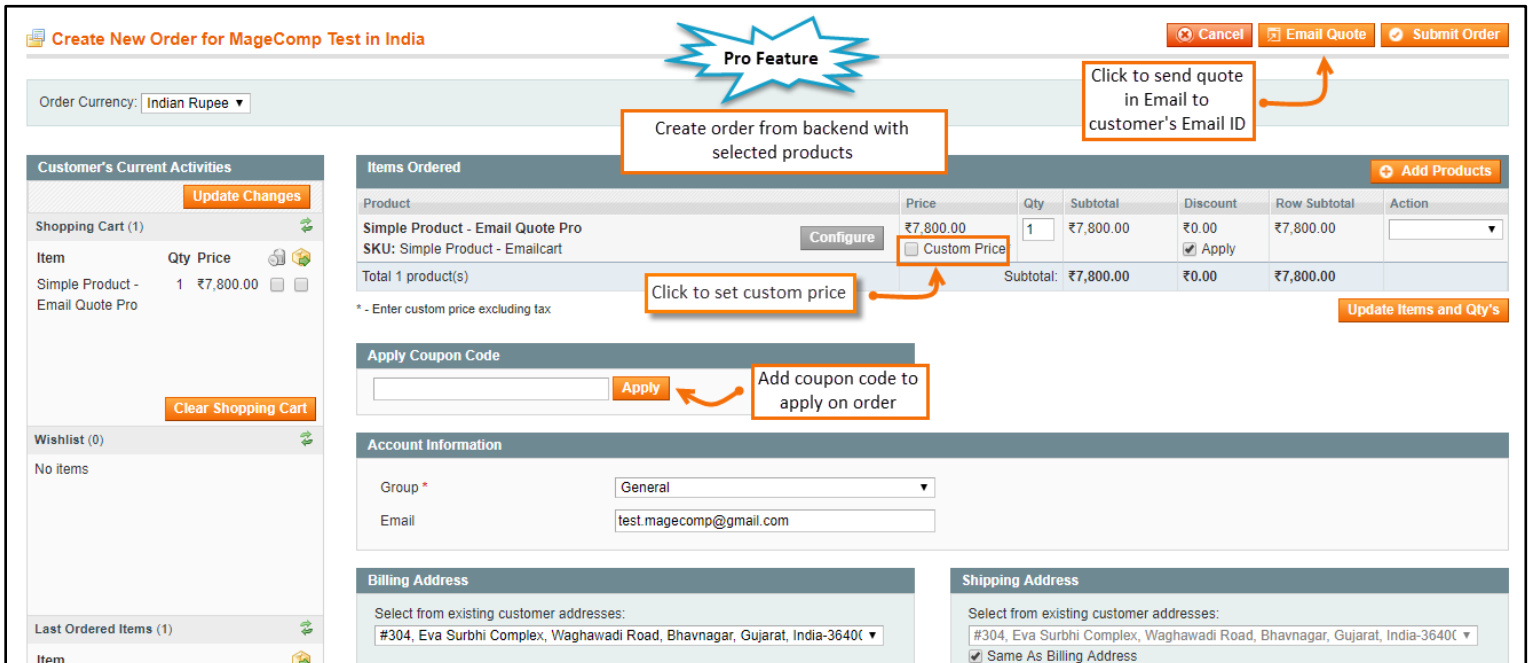
Page 1 of 1 pages | View 20 per page | Total 17 records found

Select All | Unselect All | Select Visible | Unselect Visible | 0 items selected

Quote ID	Customer Name	Customer Email	Product SKU	Grand Total	Created At	Status	Action
1061	MageComp Test	test.magecomp@gmail.com	Simple Product - Emailcart	7,800.00	2018-10-02 04:44:46	Ordered	Edit Quote
1049	Jana Bryan	janabryanGzt@teleosaurs.xyz	Simple Product - Instagram	780.00	2018-10-02 04:07:18	Sent	Edit Quote
1047	Bradly Campos	bradlycampos3pS@teleosaurs.xyz	Simple Product - Emailcart	7,800.00	2018-10-02 04:02:25	Clicked	Edit Quote

5. Email Quote Pro from Backend

To Email Quote Pro to customers from backend, simply create new order with customer and product selection and rather than submitting it, click Email Quote Pro button to send cart to customers through Email.



Create New Order for MageComp Test in India

Order Currency: Indian Rupee

Cancel | Email Quote | Submit Order

Create order from backend with selected products

Click to send quote in Email to customer's Email ID

Click to set custom price

Add coupon code to apply on order

Apply

Update Items and Qty's

Product	Price	Qty	Subtotal	Discount	Row Subtotal	Action
Simple Product - Email Quote Pro SKU: Simple Product - Emailcart	₹7,800.00	1	₹7,800.00	₹0.00	₹7,800.00	Configure
Total 1 product(s)			Subtotal: ₹7,800.00	₹0.00	₹7,800.00	

* - Enter custom price excluding tax

Account Information

Group: General

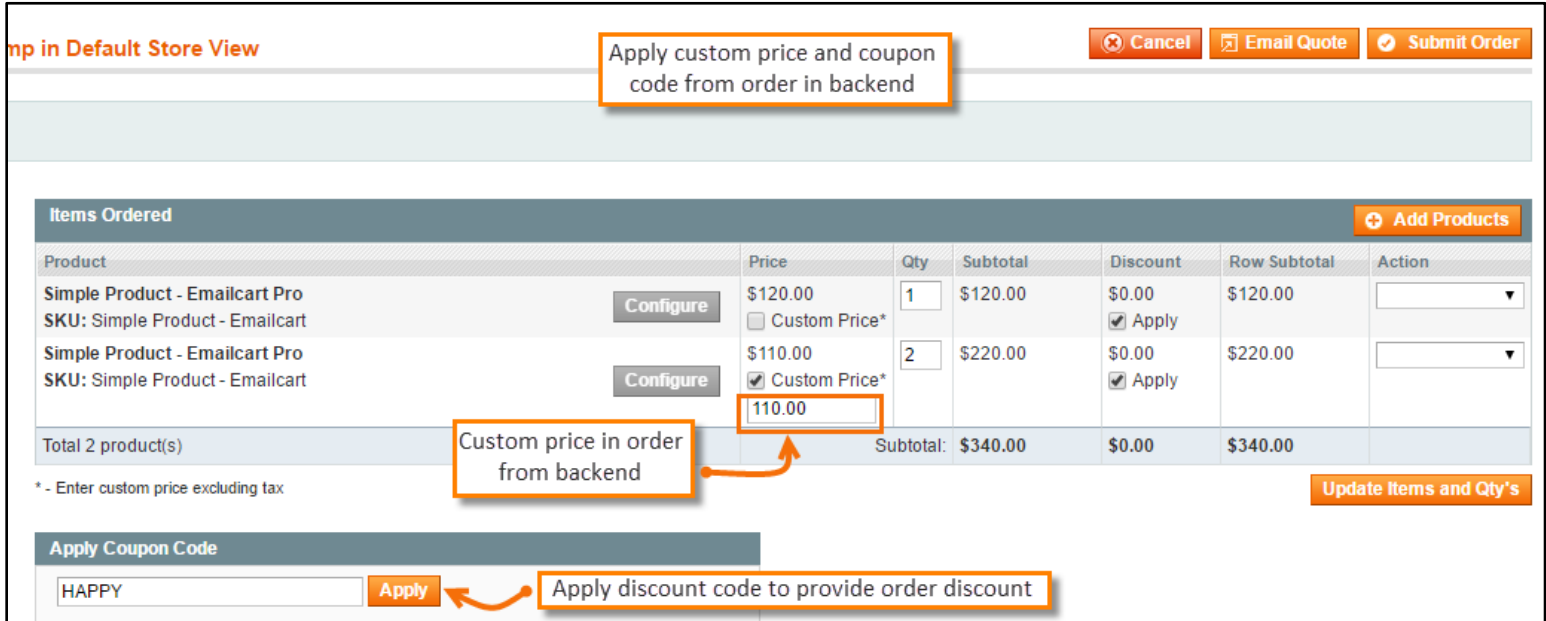
Email: test.magecomp@gmail.com

Billing Address: #304, Eva Surbhi Complex, Waghawadi Road, Bhavnagar, Gujarat, India-3640

Shipping Address: #304, Eva Surbhi Complex, Waghawadi Road, Bhavnagar, Gujarat, India-3640

- **Custom Price in Email Quote Pro from backend:**

Apart from normal products, admin can also add custom price for orders from backend. Just create order and while selecting products, you will get custom price box. Admin can also apply coupon code for discounts.



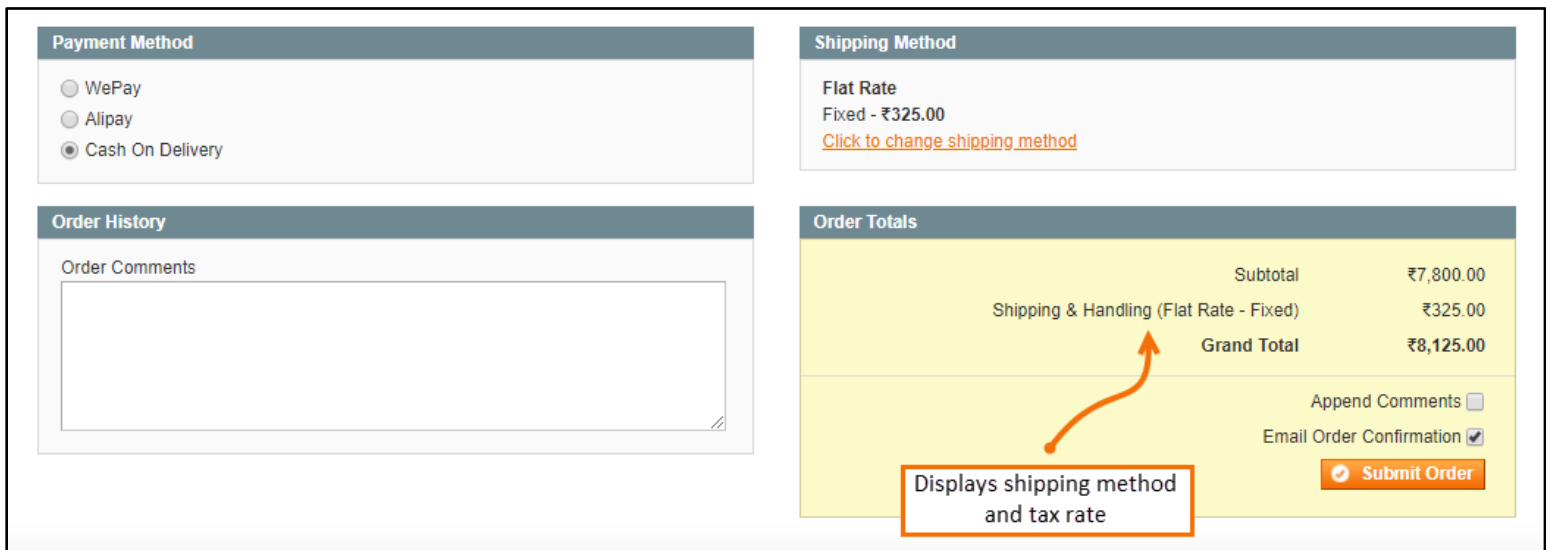
The screenshot shows the 'Email Quote Pro' backend interface. At the top, there are buttons for 'Cancel', 'Email Quote', and 'Submit Order'. A callout box points to the top area with the text: 'Apply custom price and coupon code from order in backend'. Below this is the 'Items Ordered' table:

Product	Price	Qty	Subtotal	Discount	Row Subtotal	Action
Simple Product - Emailcart Pro SKU: Simple Product - Emailcart	\$120.00	1	\$120.00	\$0.00	\$120.00	<input type="text"/>
Simple Product - Emailcart Pro SKU: Simple Product - Emailcart	\$110.00	2	\$220.00	\$0.00	\$220.00	<input type="text"/>
Total 2 product(s)			Subtotal: \$340.00	\$0.00	\$340.00	

Callouts in the screenshot include: 'Custom price in order from backend' pointing to the '110.00' price field, and 'Apply discount code to provide order discount' pointing to the 'Apply' button in the 'Apply Coupon Code' section below the table.

- **Shipping & Tax Information in backend:**

The extension also display detailed quote information like shipping and tax rates in both email and backend quote functionality.

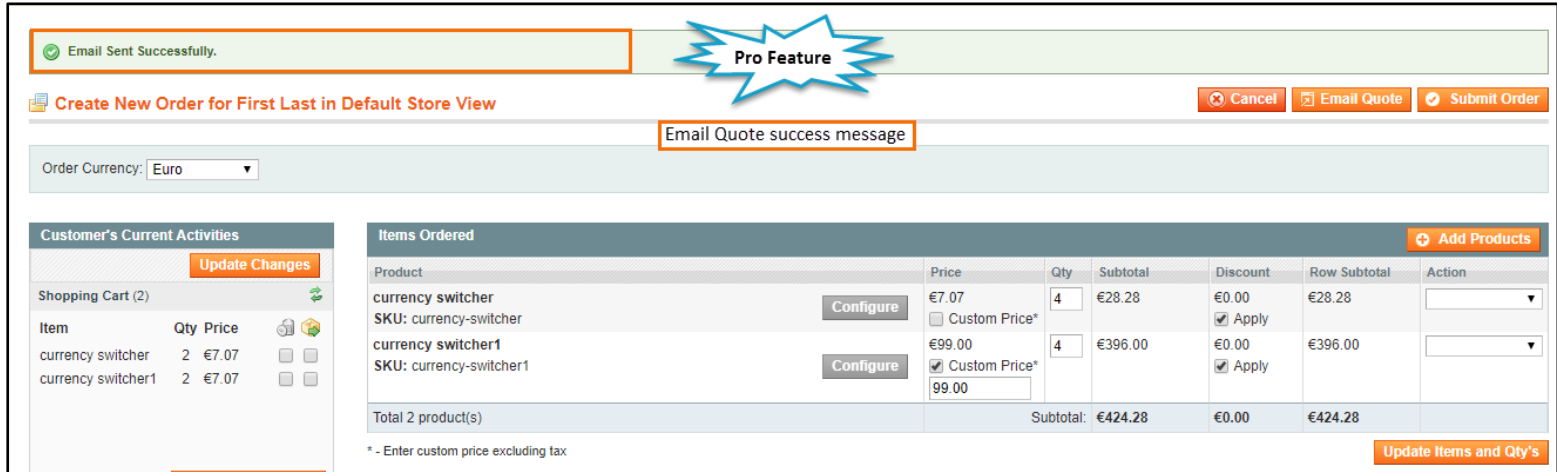


The screenshot shows the backend interface for shipping and order totals. On the left, there are sections for 'Payment Method' (WePay, Alipay, Cash On Delivery) and 'Order History' (Order Comments). On the right, the 'Shipping Method' section shows 'Flat Rate' with a fixed cost of ₹325.00 and a link to 'Click to change shipping method'. Below this is the 'Order Totals' section:

Subtotal	₹7,800.00
Shipping & Handling (Flat Rate - Fixed)	₹325.00
Grand Total	₹8,125.00

Callouts in the screenshot include: 'Displays shipping method and tax rate' pointing to the shipping and handling line item, and 'Append Comments' and 'Email Order Confirmation' checkboxes below the totals. A 'Submit Order' button is also visible.

Once the quote is send in Email to customers, success message is seen.



Email Sent Successfully.

Pro Feature

Create New Order for First Last in Default Store View Cancel Email Quote Submit Order

Email Quote success message

Order Currency: Euro

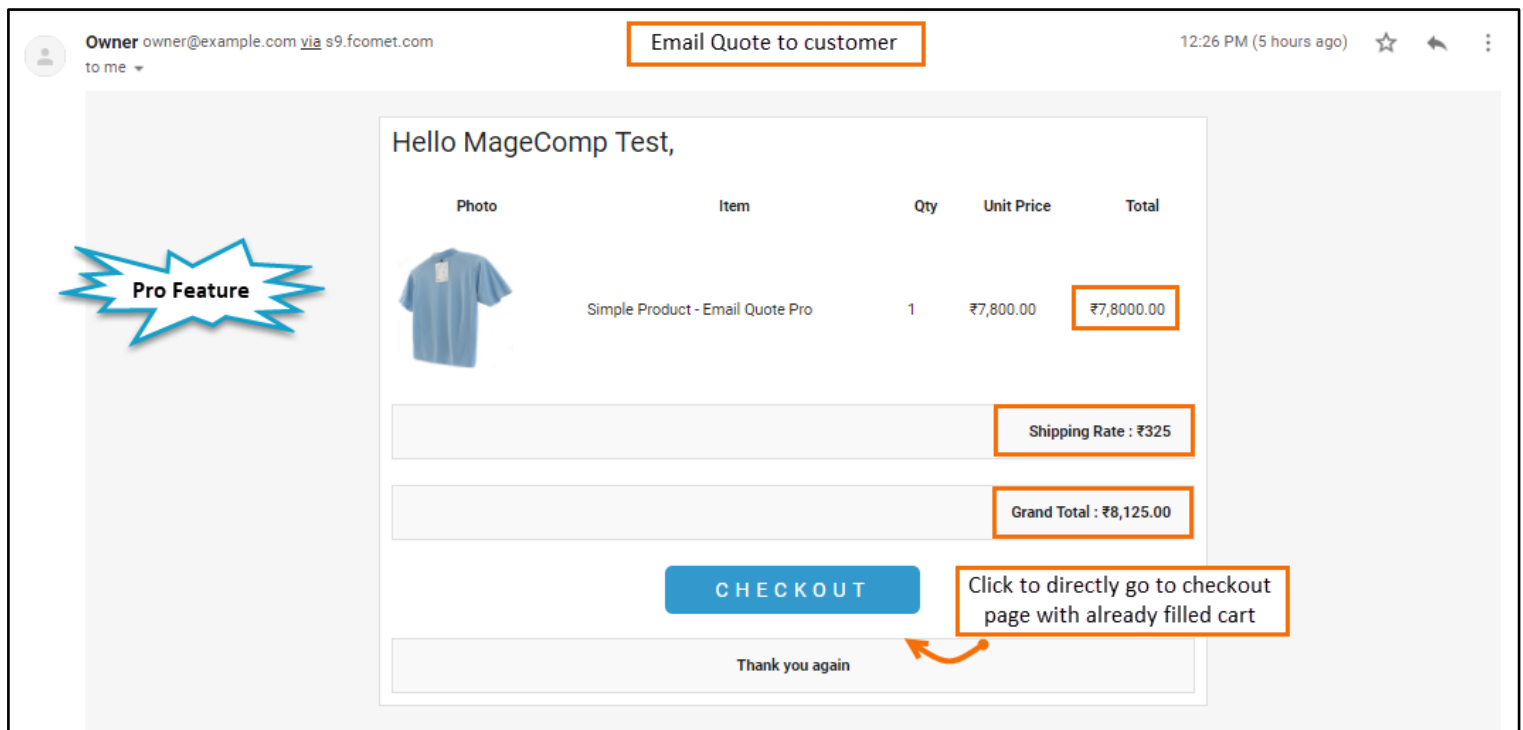
Customer's Current Activities		Items Ordered						
Update Changes		Product	Price	Qty	Subtotal	Discount	Row Subtotal	Action
Shopping Cart (2)		currency switcher	€7.07	4	€28.28	€0.00	€28.28	
Item Qty Price		SKU: currency-switcher	<input type="checkbox"/> Custom Price*			<input checked="" type="checkbox"/> Apply		
currency switcher	2 €7.07	currency switcher1	€99.00	4	€396.00	€0.00	€396.00	
currency switcher1	2 €7.07	SKU: currency-switcher1	<input checked="" type="checkbox"/> Custom Price* 99.00			<input checked="" type="checkbox"/> Apply		
Total 2 product(s)					Subtotal: €424.28	€0.00	€424.28	

* - Enter custom price excluding tax

Update Items and Qty's

6. Email Quote to Customers


Here is example of various emails that customer receives depending upon product type.



Owner owner@example.com via s9.fcomet.com to me

Email Quote to customer 12:26 PM (5 hours ago)

Hello MageComp Test,

Photo	Item	Qty	Unit Price	Total
	Simple Product - Email Quote Pro	1	₹7,800.00	₹7,800.00

Shipping Rate : ₹325

Grand Total : ₹8,125.00

CHECKOUT Click to directly go to checkout page with already filled cart

Thank you again

- **Bundled Product Email**


Owner owner@example.com via s9.fcomet.com to me

Bundle product in Email to customer

3:32 PM (0 minutes ago) ☆ ↶ ⋮

Pro Feature

Hello MageComp Test,

Photo	Item	Qty	Unit Price	Total
	Bundle Product - Email Quote Pro <i>color:</i> 1 x Simple Product - Email Quote Pro ₹7,800.00	1	₹7,800.00	₹7,800.00

Shipping Rate : ₹325.00

Grand Total : ₹8,125.00

CHECKOUT

Thank you again

- **Configurable Product Email**


Owner owner@example.com via s9.fcomet.com to me

Configurable product in Email to customer

1:29 PM (2 hours ago) ☆ ↶ ⋮

Pro Feature

Hello MageComp Test,

Photo	Item	Qty	Unit Price	Total
	Configurable Product - Email Quote <i>Color:blue</i>	1	₹7,150.00	₹7,150.00

Shipping Rate : ₹325.00

Grand Total : ₹7,475.00

CHECKOUT

Thank you again

7. Deactivation of Extension in Case of Emergency

- Manually delete all the files and content from following folders in your Magento root:
 - ✓ var/cache/*
 - ✓ var/session/*
- Make sure you've uploaded all files from the downloaded package.
- Go to `app/etc/modules/Magecomp_Emailquotepro.xml` and replace `<active>>true</active>` with `<active>>false</active>`
- Then repeat Step 1 and if something goes wrong, please contact us at <https://www.magecomp.com/helpdesk> or send us an email at helpdesk@magecomp.com

8. FAQs

- **What if I get "Access denied" error after installation of the extension?**
Whenever you get Access denied error while clicking on the extension tab after installation, log out admin panel and re-login.

Thank You!

Take a look at our other feature rich extensions:



Magento SMS Notification extension helps notifying your customers with various order status activities through SMS. [Know More...](#)



Magento Partial Payment facilitates customers to buy products just by paying down payment at the time of purchase and remaining amount to be paid later in easy installments. [Know More...](#)

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MAGENTO STORE**