

Standard and Approved Quotes mode



- ***This mode must be implemented by Commerce Vision. For Pronto ERPs. Requires versions 4.37+ for full feature use.***
- Quote requests via the standard system functionality will **not** include shipping charges. For quote calculations to include shipping, please [contact Commerce Vision](#) for assistance.

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Overview

Standard and Approved mode integrates with the quoting system in your ERP while customer approvals are managed through your Commerce Vision website. Depend on settings, users in specific Roles can view, comment, and action their own quotes or those created by others on the [Quote Review](#) page.

Once a Standard and Approved quote is created, it is loaded into your ERP, e.g., PRONTO, with the quotation status: '02'. Your Sales Rep or Customer Service team can easily identify the items on the quote, check costs (and margins), add freight, etc, there. After finalising the quote, it is converted to a Sales Order and reintegrated online. The quote requester accesses the Quote Review page and can decide what action to take. They can accept the quote and proceed to checkout. If an approver from the requester's organisation needs to approve the quote first, during checkout, the standard approval process is triggered.

Features

- Quotes over the user's budget limit will trigger the online approval process (if active). See: [Order Approvals](#)
- Integration with the [Quote Review](#) feature to provide users on a customer account with functions beyond just conversion of a quote to an order.
- Quote expiration features are included, e.g., an expiring soon reminder can be emailed to the user, you can allow customers to request reactivation of expired quotes.
- Settings configured in CMS Feature Management. (For 4.37+ only.)

Customer Experience

Quote without approver

1. After adding products, the user goes to cart and selects **Request Quote**. (By default, if quoting is enabled, the Request Quote button displays as a **Cart Button**. You can also add a **Cart Quote** navigation button anywhere on the page.)

Notify Me When In Stock


Save As Template

Hold Order

Update Order

Remove All

Request Quote

Product	Qty	Price(inc GST)	Unit	Discount	GST	Total (inc GST)
<div><div></div><div><div>Endurance T10HRC Treadmill</div><div>Code: CV100</div><div><div>Available on Back Order for Delivery</div><div>Available on Back Order for Pickup</div><div>Check Other Stores</div></div></div></div> <div><div><div>-</div><div>1</div><div>+</div></div><div>\$4,730.00</div><div>Each</div><div>5.00%</div><div>\$408.50</div><div>\$4,493.50</div></div> <div><div>Add Note</div><div>Add to Favourites</div><div>Update</div><div>Remove</div><div>Notify Me When Back In Stock</div></div>						

Deliver the order or pickup in-store?

☐ Deliver the order to my postal address

☐ I will pick up the order in-store

Subtotal (inc GST)

\$4,493.50

Total (inc GST)

\$4,493.50

Includes GST of

\$408.50

Keep Shopping

Continue To Checkout

Request Quote

2. The user confirms they want to go ahead with the quote request.

3. A successful quote is confirmed on the Quote Confirmation page.

Quote Confirmation

Step 3 of 3 - Confirmation

Print

Quote Successful!


Your order has been submitted as a quote - You will be contacted shortly to complete this order.

The details of your order are displayed below.

Delivery Address

Customer Reference 12345
Address Jane Smith
30 Lisburn Street
East Brisbane
QLD
4169
Delivery Instructions asap



Order Summary

Product	Qty	Price (inc GST)	Unit	Discount	Total (inc GST)
<div><div></div><div><div>Reflex A4 White Paper DBX-231S</div><div>Code: CV232</div></div></div> <div>1</div> <div>\$27.23</div> <div>CART</div> <div>0.00%</div> <div>\$27.23</div>					
Subtotal (inc GST)					\$27.23
Freight					No Charge



The Quote Confirmation Template can be edited. ([Content](#) [Pages & Templates](#) [Quote Confirmation Template](#))


4. A quote confirmation email is automatically sent to the user. An alert is sent to the email address assigned to receive quote notifications in the ERP.



Order Received

Web Reference: 100019889
Thanks for your order! It's currently with our Customer Service team for review; you'll receive an email confirmation with the order number shortly. In the meantime, if you have any questions, please contact us and quote web reference number (100019889).

Order Summary

Item	Qty	Price (inc GST)	Unit	Discount	Total (inc GST)
 Endurance T10HRC Treadmill Code: CV100	1	\$4,730.00	Each	5.00%	\$4,493.50
Subtotal (inc GST)					\$4,493.50
Freight					No Charge
Total (inc GST)					\$4,493.50
Including GST					\$408.50

5. Your sales team reviews the quote, makes any changes or adds shipping, then converts it into a sales order, and sends it back to be reintegrated online.

5.The user receives an alert that the checked quote can be accessed on the [Quote Review](#) page.

6. On the Quote Review page, the user and other users in the customer account with a valid Role can:


- view the quote
- forward it to other email addresses
- enter comments against it
- cancel it
- request an expired quote to be reactivated
- download a PDF copy
- accept the quote and convert it to an order.

Quote Review

[← Back To Results](#)

Order: # 100019889

Including GST \$408.50

\$4,493.50 Quotation

Quote Details


Entered By Sarah Lee
Sales Quote Date 17/05/2022
Warehouse Code MEL
Quote Expiry Date 18/05/2022

Delivery Address

A30 Lisburn St
East Brisbane
QLD
4169
Delivery Instructions asap

Carrier

Toll Ipec

Line	Product	Order Qty	Unit	Shipped Qty	Item Price (inc)	Per	Total (inc)
1	 Endurance T10HRC Treadmill Code: CV100 (Each)	1	EACH		\$4,085.00	Each	\$4,493.50
Toll Ipec Charges							\$0.00





Subtotal (Inc GST)

\$4,493.50

Total (inc GST)**\$4,493.50**

Including GST

\$408.50

 Cancel Quote Reprint Quote Quote Followup Accept Quote

Standard & Approved quote with Approver

The Standard and Approved mode is integrated to the Approvals feature. When set up for a customer or user, an over budget limit quote can only be converted to an order after acceptance by a valid approver. See: [Order Approvals](#).

1. Once the quote has been reintegrated online, the quote requester accepts the quote and starts checking out. On the last checkout page, the Select Approver dropdown appears. Where there are more than one valid approver, the user can select one.

Step 1 of 2 - Confirm your order and process payment

Order Summary

Quick View

Edit

Subtotal (inc GST)

\$687.50

Total (inc GST)

\$687.50

Including GST

\$62.50

Delivery Address

Edit

Address

A

Select Approver

Select Single Approver

Please Select ..

Payment

Approval

The Approval record(s) set for this order are not valid.

Return To Quotes

2. The user selects an approver, then clicks **Process Order**.

Select Approver

Select Single Approver

Chris (cvchristesting+approver@gmail.com)

Payment

Approval

Please ensure you click 'Process Order' to submit this order for Approval.

Process order

3. A quote confirmation email is automatically sent to the user. An alert is sent to the email address nominated in the ERP to receive quote submission notifications.

5. The approver receives an email. They log into their account and can accept/reject the quote in [Approve Orders](#). **NOTE** - The quote creator can no longer action the quote in [Quote Review](#).

Home > Dashboard > Orders Approval

Order Approval

Below is a list of orders that require approval by you.

Search for Orders							Print
Search							Clear
3 records, (1 page)							
Order No.	Order date	Entered By	Your Reference	Total (inc. GST)	Options		
10000018	05-Apr-2022	sarahl.testing@gmail.com	Acc Code - A & A Cabinets	\$153.96	View	Approve	Reject
10000019	05-Apr-2022	sarahl.testing@gmail.com	Acc Code - A & A Cabinets	\$284.83	View	Approve	Reject
10000028	12-Apr-2022	sarahl.testing@gmail.com	Acc Code - A & A Cabinets 12345	\$250.80	View	Approve	Reject



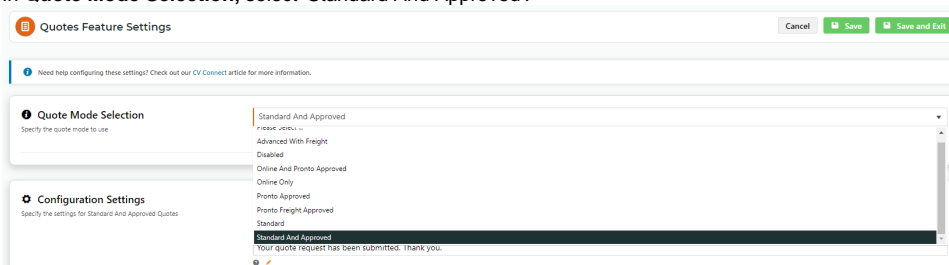
Approve Orders is a step in the Order Approvals process. User access is through the [Dashboard menu](#). See: [Approve Orders](#) .

Configure Standard and Approved mode

1. In the CMS, go to **Settings Feature Management Payment & Checkout Quotes**.
2. Ensure **Quotes** is toggled ON, then click **Configure**.



3. In **Quote Mode Selection**, select 'Standard And Approved'.



4. The quote search comes with default fields. To add other fields, in **Quote Search Custom Field List**, add the required fields. Leave blank if not needed.
5. (Optional) In **Quote Request Submitted Message**, edit the confirmation message displayed to the user after submitting a quote.

Home > Order Complete

Your quote request has been submitted. Thank you.

6. The [Expired Quote Usage Request Email](#) button goes to the email template used when a user asks for an expired quote to be re-activated. There, the email message can be edited. See: [Expired Quote Usage Request Email Information Widget](#).
7. The **Edit Website Users** button goes to the [Website Users](#) function. This allows you to look up users to check and edit user budgets.
8. The **Edit Quote Cancelled Reasons** button goes to the **Quote Cancelled Reason Maintenance** page. There, quote cancellation reasons can be added, edited and deleted. A user must select a reason when they want to delete a quote.

Maintain Quote Cancellation Reasons

Quote Cancelled Reason Maintenance

Quotes Feature SettingsAdd New Quote Cancelled Reason

Quote Cancelled Reason Search

Search:

Search

Reset Search

Active?	Code	Description		
Yes	A	No longer want to purchase.	Edit	Delete
Yes	B	Not specified	Edit	Delete
Yes	H	Price too high	Edit	Delete

1 - 3 of 3 items

To add a reason:

- Click the **Add New Quote Cancellation Reason** button.
- In **Add Quote Cancelled Reason**, set the options:

Add Quote Cancelled Reason

CancelSave

Quote Cancelled Reason Details

Edit quote cancelled reason information

Is Active

Code *

Description *

Is active: toggle ON for this reason to be available to users

Code: a unique Id code for this reason

Description: description of reason (displays to the user)

- Click **Save**.

- In **Task Options**, set options for the scheduled task that sends the expiring soon email. **NOTE** - The expiry date is integrated from your ERP.

Task Options

Configure settings related to Quote Features Settings

Tasks

Number of days before quote expiring to send email *

14

Date to start running scheduled task

29/11/2021 12:30 PM

Pick a start date. The scheduled task will run every day from that date at the same time of day specified in the date.

Quote Reminder Email

Number of days before quote expires to send email: enter the number of days before the expiration date to send a reminder email,

Date/time to start running scheduled task?: enter the date and time the scheduled task starts.

- The Quote Reminder Email button go to the [Quote Reminder Email](#) template. You can edit the email message in the [Quote Reminder Information Widget](#).

- Click **Save**.

Additional Information

Minimum Version Requirements

4.37

Prerequisites	--
Self Configurable	No
Business Function	Orders
BPD Only?	Yes
B2B/B2C/Both	B2B
Third Party Costs	n/a

Related help

- [Freight Recalculation from Quote Review](#)
- [Quotes](#)
- [Online Quotes mode](#)
- [Quote Review](#)
- [Standard Quotes mode](#)
- [Quote Requests - Classic sites](#)

Related widgets

- [Online Quote Validation Widget](#)
- [Quote Review Widget](#)
- [Quote Reminder Email Information Widget](#)
- [Expired Quote Usage Request Email Information Widget](#)
- [Quote Order Switch Button Widget](#)
- [Cart Cancel Quote Button Widget](#)
- [Quote Submitted Message Widget](#)
- [Cart Quote Button Widget](#)