

Vendor Request For Quotation - User Guide

by CedCommerce Products User Guides

1. Overview	3
2. Configuration Settings	3
3. Submit Quote From the Front-end View	4
4. Manage Quotations from Vendor Panel	8
4.1. Edit Quotation	10
4.2. Create Purchase Order	12
5. Manage Purchase Orders from the Vendor Panel	19
6. Manage Purchase Orders from the Front-end View	21
7. Place an Order	22

1. Overview

Vendor Request For Quotation Addon, developed by CedCommerce provides the front-end users an ability to quote for the vendors' products apart from the admin's products. This means, for a specific product of vendor, users can send a request for quotation at desired price for total quantity of the product. It allows users to submit quote for multiple products in desired quantity with the desired price. Thus, the users can negotiate prices and quantity and get the final price for the total quantity of the product or services.

It is compatible only with the **CedCommerce Multi-Vendor Marketplace** extension and the **Request For Quotation** extension.

Key features are as follows:

- Admin can enable or disable the add-on.
- Allows the users, vendors, and admin to send offline messages regarding the quotation.
- Users can send quotation for multiple products of a vendor.
- Users can negotiate the prices and quantity with the vendor.
- Users can edit their quotes before approval.
- Users can estimate shipping rates for the corresponding quotation from different shipping method at the time of submitting quote.
- Users receive email notifications in correspondence to updating the status of the quotation.
- Users receive the email notifications and PDF for the PO.
- Vendor can create completed as well as partial purchase order for the requested quote.
- Vendor can approve or cancel the quotation submitted for the products.

2. Configuration Settings

Since, the **Vendor Request for Quotation** add-on is compatible with the **Request For Quotation** extension and **Marketplace Basic** extension, it is assumed that the admin has enabled all the required configuration settings.

Other than these settings, the configuration setting to enable the **Vendor Request for Quotation** add-on is required.

To enable the vendor RFQ system

1. Go to the Admin panel.
2. On the left navigation bar, click the **MARKETPLACE** menu, and then click **Vendor Configuration**. The **Configuration** page appears as shown in the following figure:

The screenshot shows the 'Configuration' page with a sidebar on the left containing 'MARKETPLACE', 'Installed Extensions', 'Vendor Configuration' (highlighted), and 'Vendor Social Login'. The main area is titled 'General' and contains three settings, each with a dropdown menu set to 'Yes':

- Enable Vendor System [website]
- Enable Product Assignment [website]
- Enable Vendor RFQ System [website] (highlighted with a red box)

An orange 'Save Config' button is located in the top right corner of the configuration area.

3. In the right panel, under **General**, in the **Enable Vendor RFQ System** list, select **Yes**.
4. Click the **Save Config** button.

3. Submit Quote From the Front-end View

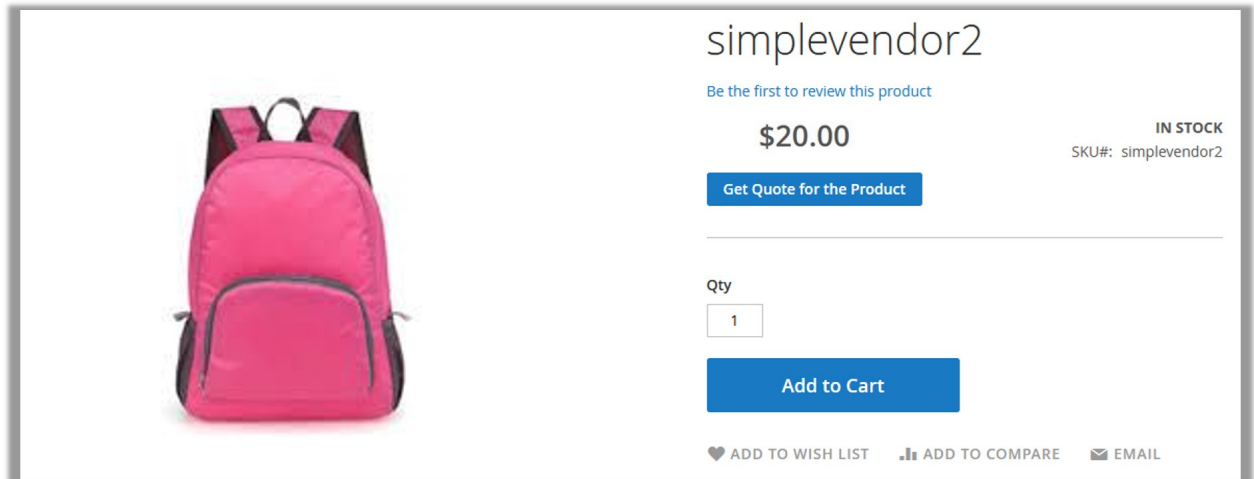
This add-on provides the facility to the front-end users to submit the quotation for a single product or multiple product at the same time.

To submit a quote

1. Go to the Front-end View.
2. Open the products page, where required product is displayed.
Shown in the following figure.



3. Click the required product.
The Product view page appears as shown in the following figure:



4. Click the **Get Quote for the Product** button.

The Quotation form appears as shown in the following figure:

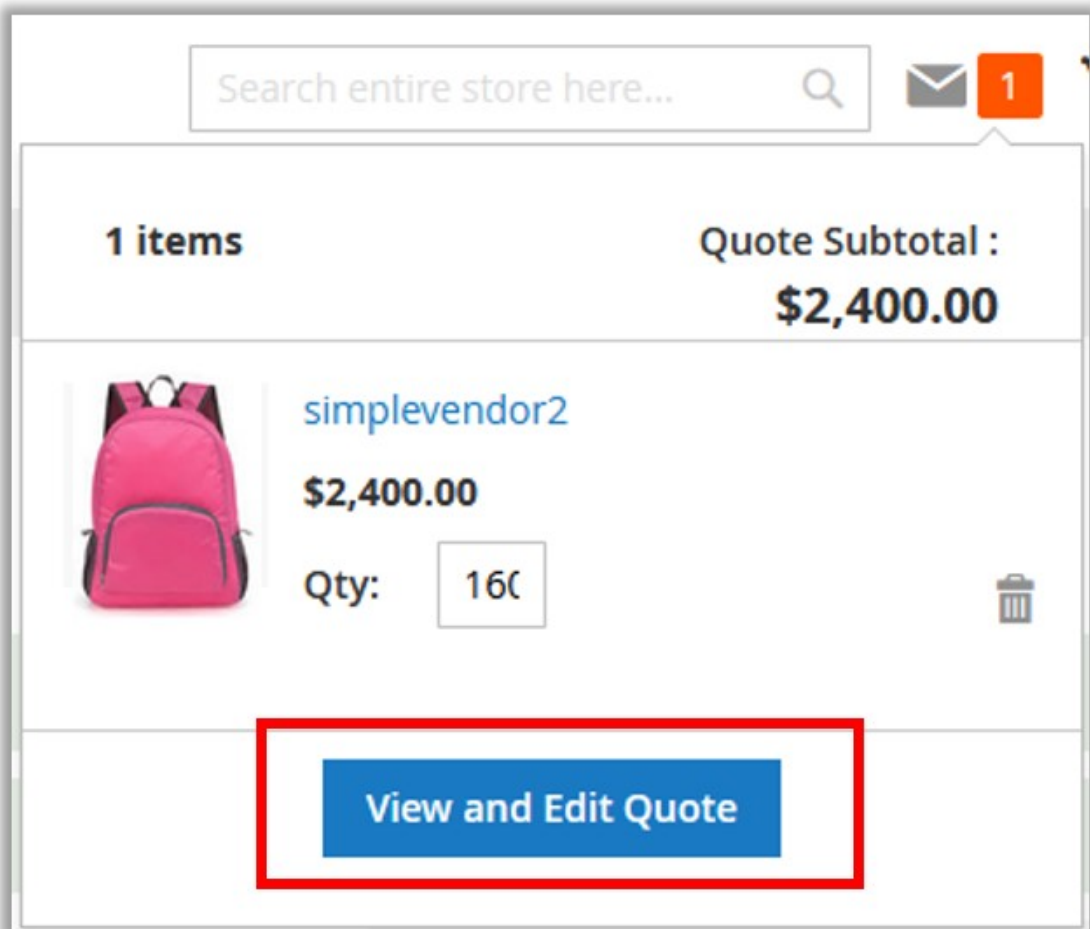
5. In the **Enter Quantity** box, enter the required number of product.
 6. In the **Enter Quoted Price** box, enter the total amount of the whole quantity.
 7. In the **Enter Description** box, enter the description of the quotation.
 8. Click the **Send** button.

The quotation is saved and a success message appears as shown in the following figure:



9. In the upper-right corner, click the **Cart** icon.


The **View and Edit Quote** dialog box appears as shown in the following figure:



10. Click the **View and Edit Quote** button.

The **Requested Quotation Cart** page appears as shown in the following figure:

Requested Quotation Cart

Item	Product Name	Sku	Base Price	Qty	Subtotal	Action
	simplevendor2	simplevendor2	10.0000	160	2400	Delete Quote

Summary

Customer Name

Customer Email

Country

State

City

Address

Zip Code

Contact Info

Message or Comment

[Get Shipping Rates](#)

Main Website
☒ Flat Rate flatrate \$800.00

Subtotal \$2,400.00

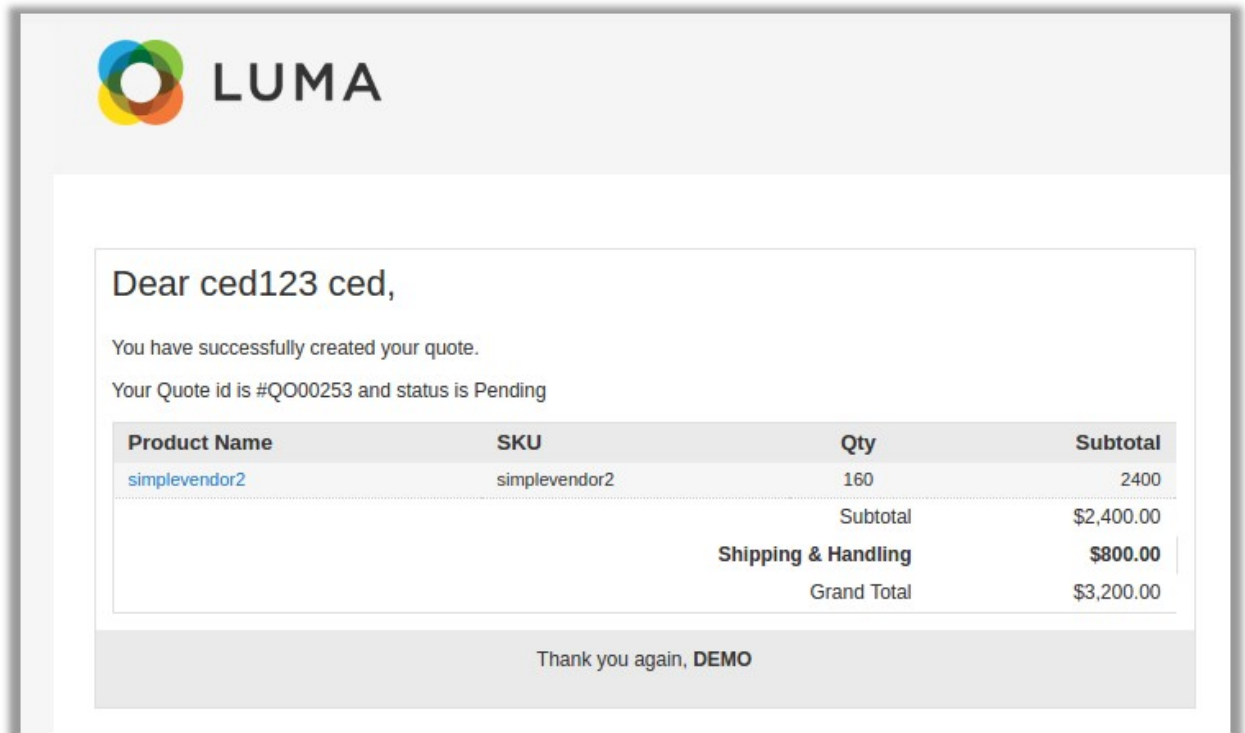
Quote Total **\$3200.00**

[Submit Quote](#)

On this page, the user can enter the details under the **Summary** section, and submit the quote. Also, the user can delete the quote.

11. Under the **Summary** section, enter the required values the fields.
12. Click the **Get Shipping Rates** button.
The available shipping appear.
13. Click to select the shipping rate.
The shipping rate value is added to the **Subtotal** value, and the **Quote Total** value appears.
14. Click the **Submit Quote** button.

A mail is sent to the user after submitting the quote, as per the example shown in the following figure:



The submitted quotation details appear on the **My Quotes** page as shown in the following figure:

<ul style="list-style-type: none"> Account Dashboard Account Information Address Book Chat With Live Support Team My PO My Quotes Newsletter Subscriptions My Orders My Downloadable Products My Product Reviews My Credit Cards Billing Agreements My Wish List 	My Quotes										
	Quote Original Price	Quote Settled Qty	Quote Settled Price	Address	State	Country	Shipping Method Selected	Shipping Estimated Cost	Telephone Number	Current Status	Action
	3.00	6	\$3.00	kokoko,	New York	United States	DHL N-10	\$47.24	65	Pending	Edit
	2.00	2	\$2.00	ghfgh,	New York	United States	Flat Rate flatrate	\$15.00	5656	Pending	Edit
	3.00	10	\$10.00	ghfgh,	New York	United States	Flat Rate flatrate	\$15.00	5656	Processing	Edit
	0.00	0	\$0.00	Address,	Georgia	United States	Flat Rate flatrate	\$800.00	7888798959	Pending	Edit
	2400.00	160	\$2400.00	Address,	Georgia	United States	Flat Rate flatrate	\$800.00	7888798959	Pending	Edit

Items 191 to 195 of 195 total

The status appears as Pending. The user can edit the quote until the vendor approves the quote. Also the user can delete the quote, if not required.

4. Manage Quotations from Vendor Panel

The vendor can view all the Quotations details sent by different front-end users, listed on the **Vendor Quote Management** page.

Vendor Quote Management										
Search		Reset Filter	26 records found			20	per page	<	1	of 2 >
Quote Increment Id	Created At ↑	Customer Email	Status	Quote Price	Quote Requested Qty	Quote Updated Qty	Quote Shipping Amount	Quote Updated Price	Shipping Method	View
				From To			From To	From To		
QO00253	2017-07-13 11:49:04		Pending	\$2,400.00	160	160	\$800.00	\$2,400.00	Flat Rate flatrate	Edit

The vendor can perform the following tasks:

- **Edit the quotation details**(<http://docs.cedcommerce.com/cedcommerce/vendor-request-quotation-user-guide?section=edit-quotation-2>)
: Vendor can edit the quantity and unit price and thus negotiate with the users. Until the status is Approved, the vendor can edit the quotation details.
- **Create the Purchase Order**(<http://docs.cedcommerce.com/cedcommerce/vendor-request-quotation-user-guide?section=create-purchase-order-2>)
: Only after approving the quotation (when the status is set to **Approved**), the vendor can create the Purchase Order (PO) and send to the corresponding users to proceed further.

Here are some of the statuses of the quotation from submitting the quotation to completing the order. The same statuses are reflected on the **My Quotes** page of the User account, based on the corresponding status appearing on the **Vendor Quote Management** page of the Vendor panel.

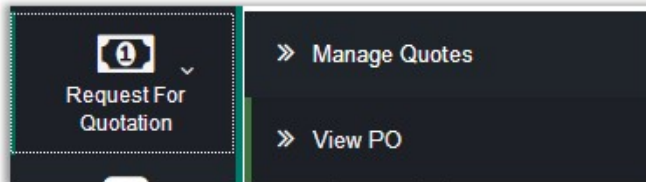
Quote Totals	
Subtotal	\$ 1440.00
Shipping & Handling	\$800.00
Grand Total	\$ 2240.00
Total Due	\$ 2240.00
Status	<div>Processing</div> <div> <div>Pending</div> <div>Processing</div> <div>Approved</div> <div>Cancelled</div> <div>PO created</div> <div>Partial Po</div> <div>Ordered</div> <div>Complete</div> </div>

- **Pending:** When the user submits the quotation.
- **Processing:** When the vendor edits the quotation.
- **Approved:** When the vendor approves the quotation.
- **Cancelled:** When the vendor cancels the quotation.
- **PO created:** When the vendor creates the PO after approving the quotation.
- **Patial Po:** When the vendor creates the partial PO.
- **Ordered:** When the User places the order by adding the product to the cart.
- **Complete:** When the order is placed for all the quoted quantity.

4.1. Edit Quotation

To edit the quotation details

1. Go to the **Vendor** panel.
2. On the left navigation bar, click the **REQUEST FOR QUOTATION** menu.



3. Click **Manage Quotes**.

The **Vendor Quote Management** page appears as shown in the following figure:

Vendor Quote Management										
Search		Reset Filter	26 records found			20	per page	<	1 of 2	>
Quote Increment Id	Created At ↑	Customer Email	Status	Quote Price	Quote Requested Qty	Quote Updated Qty	Quote Shipping Amount	Quote Updated Price	Shipping Method	View
				From			From	From		
				To			To	To		
QO00253	2017-07-13 11:49:04		Pending	\$2,400.00	160	160	\$800.00	\$2,400.00	Flat Rate flatrate	Edit

4. Scroll down to the required quotation.
 5. In the **View** column of the required quotation row, click the **Edit** link.
- The page appears as shown in the following figure:

Quote # QO00253

[← Back](#)

Quote & Account Information

Order # (The quote email was sent)

Quote Date	2017-07-13 11:49:04
Current Quote Status	Pending
Quote Created From	Default Store View
Quoted Total Quantity	160
Quoted Total Price	\$2,400.00

Account Information

Customer Name	ced123 ced
Email	
Customer Group	General

Address And Shipping Information

Shipping Address

ced123 ced
Address,
City, Georgia, 243785
United States
T: 7888798959

Shipping Information

Shippment Method Selected: Flat Rate flatrate
Total Shipping Charges: \$800.00

Items Ordered

Product:	Item Stock:	Actual Price:	Quoted Price:	Updated Unit Price:	Quoted Qty:	Updated Quote Qty:	Subtotal:	Row Total
simplevendor2	122099	\$10.00	\$2,400.00	\$	Quantity to PO: 160	160	\$ 1440	\$
SKU: simplevendor2				9.00	Quantity Already POed: 0			1440

Messaging section

Chat History

[View Message History](#)

Send a message

Quote Totals

Subtotal	\$ 1440.00
Shipping & Handling	\$800.00
Grand Total	\$ 2240.00
Total Due	\$ 2240.00
Status	Processing ▼

[Save Quote](#)

6. Under the **Items Ordered** section, in the **Updated Unit Price** box, enter the required value.

The **Subtotal** amount is calculated and displayed in the **Subtotal** field. Under the **Quote Totals** section, the **Subtotal**, **Shipping & Handling** charges, **Grand Total**, and **Total Due** values appear. In the **Status** list, the **Processing** status appears.

- Click the **Save Quote** button, if you do not want to make the further changes.

The quotation is saved and the success message appears on the **Manage Quote Requests** page.

Note: To create the PO, admin has to first approve the quotation(Select the **Approved** Status.)

The corresponding status appears on the **My Quotes** page of the Front-end user account as shown in the following figure:

My Quotes											
Quote Original Price	Quote Settled Qty	Quote Settled Price	Address	State	Country	Shipping Method Selected	Shipping Estimated Cost	Telephone Number	Current Status	Action	
3.00	6	\$3.00	kokoko,	New York	United States	DHL N-10	\$47.24	65	Pending	Edit	
2.00	2	\$2.00	ghfgh,	New York	United States	Flat Rate flatrate	\$15.00	5656	Pending	Edit	
3.00	10	\$10.00	ghfgh,	New York	United States	Flat Rate flatrate	\$15.00	5656	Processing	Edit	
0.00	0	\$0.00	Address,	Georgia	United States	Flat Rate flatrate	\$800.00	7888798959	Pending	Edit	
2400.00	160	\$2400.00	Address,	Georgia	United States	Flat Rate flatrate	\$800.00	7888798959	Pending	Edit	

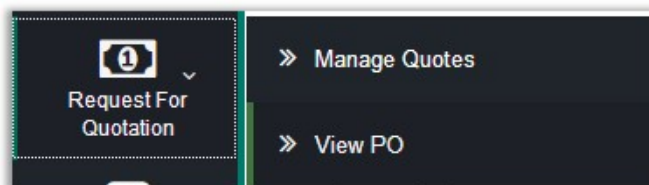
Items 191 to 195 of 195 total

4.2. Create Purchase Order

Only after approving the quotation, the vendor can create the Purchase Order(PO).

To create PO

- Go to the **Vendor** panel.
- On the left navigation bar, click the **REQUEST FOR QUOTATION** menu.



- Click **Manage Quotes**.

The **Vendor Quote Management** page appears as shown in the following figure:

Vendor Quote Management										
Search		Reset Filter		26 records found			20	▼	per page	< 1 of 2 >
Quote Increment Id	Created At ↑	Customer Email	Status	Quote Price	Quote Requested Qty	Quote Updated Qty	Quote Shipping Amount	Quote Updated Price	Shipping Method	View
				From To			From To	From To		
QO00253	2017-07-13 11:49:04		Pending	\$2,400.00	160	160	\$800.00	\$2,400.00	Flat Rate flatrate	Edit

4. Scroll down to the required quotation.
5. In the **View** column of the required quotation row, click the **Edit** link.
The page appears as shown in the following figure:

Quote # QO00253

[← Back](#)

Quote & Account Information

Order # (The quote email was sent)

Quote Date	2017-07-13 11:49:04
Current Quote Status	Pending
Quote Created From	Default Store View
Quoted Total Quantity	160
Quoted Total Price	\$2,400.00

Account Information

Customer Name	ced123 ced
Email	
Customer Group	General

Address And Shipping Information

Shipping Address

ced123 ced
Address,
City, Georgia, 243785
United States
T: 7888798959

Shipping Information

Shippment Method Selected: Flat Rate flatrate
Total Shipping Charges: \$800.00

Items Ordered

Product:	Item Stock:	Actual Price:	Quoted Price:	Updated Unit Price:	Quoted Qty:	Updated Quote Qty:	Subtotal:	Row Total
simplevendor2	122099	\$10.00	\$2,400.00	\$	Quantity to PO: 160	160	\$ 1440	\$ 1440
SKU: simplevendor2				9.00	Quantity Already POed: 0			

Messaging section

Chat History

[View Message History](#)

Send a message

Quote Totals

Subtotal	\$ 1440.00
Shipping & Handling	\$800.00
Grand Total	\$ 2240.00
Total Due	\$ 2240.00
Status	Processing ▼

[Save Quote](#)

6. Make the changes, if required.

7. Under the **Quote Totals** section, in the **Status** box, select **Approved**.

Quote Totals

Subtotal

\$ 1440.00

Shipping & Handling

\$800.00

Grand Total

\$ 2240.00

Total Due

\$ 2240.00

Status

Processing

Pending

Processing

Approved

Cancelled

PO created

Partial Po

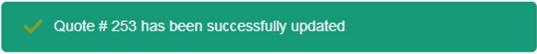
Ordered

Complete

8. Click the **Save Quote** button.

The **Status** is changed to **Approved** and the page is redirected to the

Vendor Quote Management



Search

Reset Filter

26 records found

20 per page

1 of 2

Quote Increment Id	Created At ↑	Customer Email	Status	Quote Price	Quote Requested Qty	Quote Updated Qty	Quote Shipping Amount	Quote Updated Price	Shipping Method	View
				From To			From To	From To		
QO00253	2017-07-13 11:49:04		Approved	\$2,400.00	160	160	\$800.00	\$1,440.00	Flat Rate flatrate	Edit

9. In the **View** column of the required quotation row, click the **Edit** link.

The page appears as shown in the following figure:

Quote # QO00253

← Back

Create PO

Quote & Account Information

Order # (The quote email was sent)

Quote Date

2017-07-13 11:49:04

Current Quote Status

Approved

Quote Created From

Default Store View

Quoted Total Quantity

160

Quoted Total Price

\$2,400.00

Account Information

Customer Name

ced123 ced

Email

Customer Group

General

10. On the top navigation bar, click the **Create PO** button.
The page appears as shown in the following figure:

Submit PO for quote #QO00253

← Back

Account Information

★ Customer Group

General

Customer Email

Customer Name

Address And Shipping Information

Customer Address Information

ced123 ced
Address,
City, Georgia - 243785
United States
T: 7888798959

Shipping Information

Shippment Method Selected:Flat Rate flatrate
Total Shipping Charges: \$800.00

Items Ordered

Product	Actual Price	Quoted Price	Updated Unit Price	Quoted Qty	Updated Quote Qty	Subtotal	Row Total
simplevendor2 SKU: simplevendor2	\$10.0000	\$1440.00	\$ 9.00	Quantity to PO : Quantity Already POed :	160 0	\$ 1440	\$ 1440

Purchase Order Total

Subtotal	\$ 1440
Shipping & Handling	\$800.00
Grand Total	\$ 2240
Total Due	\$ 2240

Submit Purchase Order

11. Make the changes, if required, and then click the **Submit Purchase Order** button. A success message appears, and the page is redirected to the **Vendor PO Management** page. The created PO is listed on the page. the status appears as **Pending**.

Vendor PO Management

Search

Reset Filter

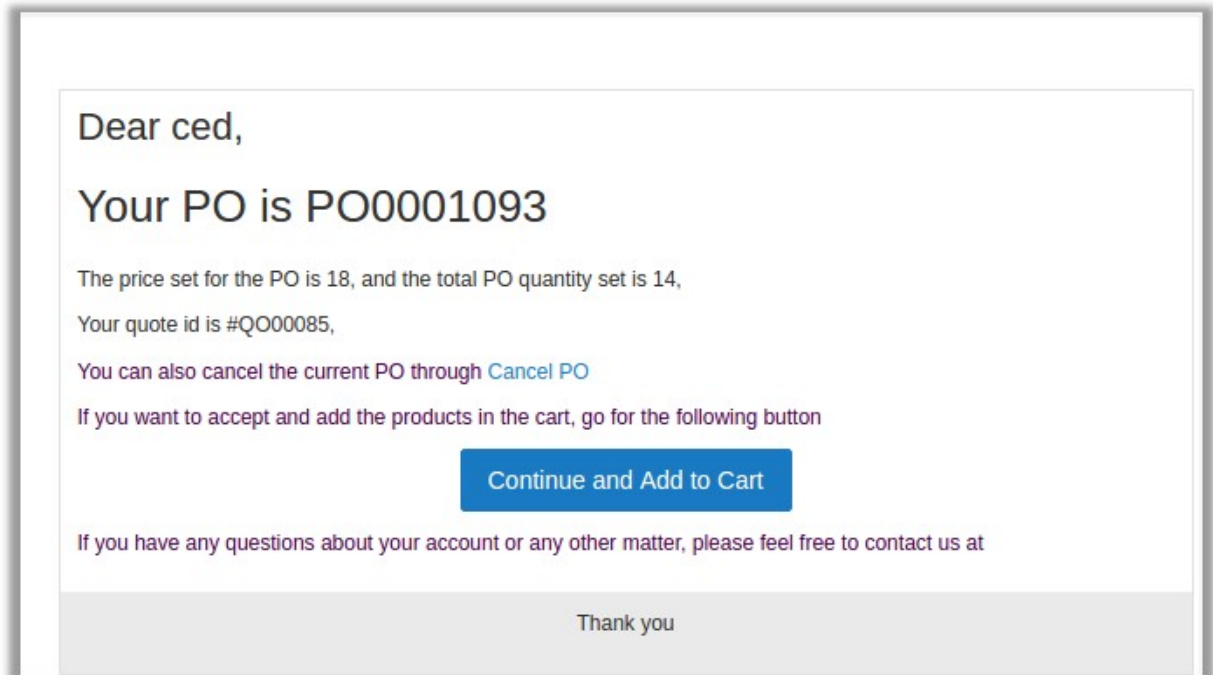
17 records found

20 per page

1 of 1

PO Increment Id	Customer Id	PO Price	PO Qty	Status	Quote Increment Id	Created At	View
		From To					
PO00000182	30	\$2,240.00	160	Pending	QO00253	2017-07-13 12:41:15	View

The mail is sent to the front-end user after the PO creation; for example, appears as shown in the following figure:



The user can add the product to the cart by clicking the **Continue and Add to Cart** button appearing in the email, or can log in the user account and follow a certain process to manage the PO and finally place the order.

Front-end View

After the PO is created, the status of the PO appears as **Pending**.

Account Dashboard

Account Information

Address Book

Chat With Live Support Team

My PO

My Quotes

Newsletter Subscriptions

My PO's

PO Increment Id	Quote Increment Id	Vendor	Quote Updated Qty	Quote Updated Price	PO Qty	PO Price	Created At	Comments	Status	Action
PO00000182	QO00253	s s	160	1440.00	160	\$2,240.00	2017-07-13 12:41:15		Pending	View

The status of the Quote appears as **PO Created**.

Account Dashboard

Account Information

Address Book

Chat With Live Support Team

My PO

My Quotes

Newsletter Subscriptions

My Orders

My Downloadable Products

My Product Reviews

My Credit Cards

Billing Agreements

My Wish List

My Quotes

Quote original price	Quote Settled Qty	Quote Settled Price	Address	State	Country	Shipping Method Selected	Shipping Estimated Cost	Telephone Number	Current Status	Action
3.00	6	\$3.00	kokoko,	New York	United States	DHL N~10	\$47.24	65	Pending	Edit
2.00	2	\$2.00	ghfgh,	New York	United States	Flat Rate flatrate	\$15.00	5656	Pending	Edit
3.00	10	\$10.00	ghfgh,	New York	United States	Flat Rate flatrate	\$15.00	5656	Processing	Edit
0.00	0	\$0.00	Address,	Georgia	United States	Flat Rate flatrate	\$800.00	7888798959	Pending	Edit
2400.00	160	\$1440.00	Address,	Georgia	United States	Flat Rate flatrate	\$800.00	7888798959	PO Created	View

5. Manage Purchase Orders from the Vendor Panel

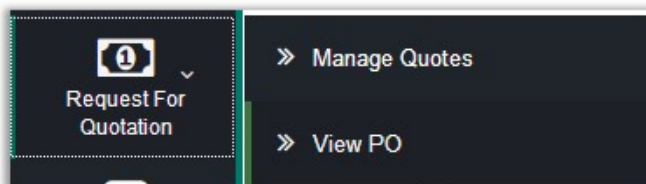
The vendor can view all the PO details available on the **Vendor PO Management** page. As the PO is created, the status of the PO appears as **Pending**.

Here are some of the statuses of the PO from sending the PO to confirming the Order. The same statuses are reflected on the **My PO's** page of the User account, based on the corresponding status appearing on the **Vendor PO Management** page of the Vendorpanel.

- **Pending:** When the PO is created and no action is taken by the user.
- **Declined:** When the user declines the Purchase Order
- **Confirmed:** When the user approves the PO.
- **Note:** On the Front-end View the [Add to Cart](#) link appears.
- **Ordered:** When the user places the order.

To view the PO details

1. Go to the **Vendor** panel.
2. On the left navigation bar, click the **REQUEST FOR QUOTATION** menu.



3. Click **View PO**.

The vendor PO Management page appears as shown in the following figure:

Vendor PO Management							
Search		Reset Filter	17 records found		20	per page	1 of 1
PO Increment Id	Customer Id	PO Price	PO Qty	Status	Quote Increment Id	Created At	View
		From					
		To					
PO00000182	30	\$2,240.00	160	Pending	QO00253	2017-07-13 12:41:15	View

4. Scroll down to the required PO.
5. In the **View** column of the required quotation row, click the **View** link.
The page appears as shown in the following figure:

PO # PO00000182

← Back

PO Information

PO00000182

PO Date

2017-07-13 12:41:15

PO Status

Pending

Account Information

Customer Name

ced123 ced

Email Id

Customer Group

General

Shipping & Handling Information

Shipped To

ced123 ced
Address,
City, Georgia, 243785 United States
Telephone : 7888798959

Shipping Method

Flat Rate flatrate
Shipment Amount \$800.00

Items Invoiced

Product	Original Price	Quoted Price	PO Price	Quoted Qty	PO Qty	Remaining Qty	PO Row Total
simplevendor2 SKU: simplevendor2	\$10.0000	\$1440.00	\$1440.00	160	160	0	\$1,440.00

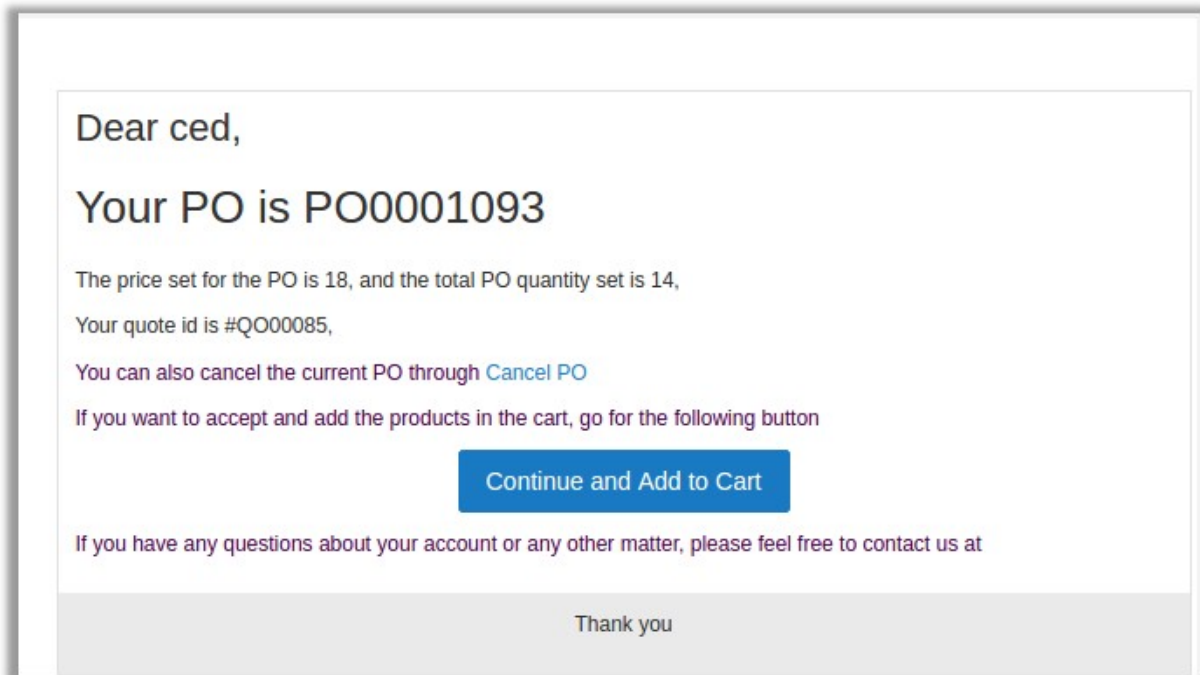
Order Total

Order Totals

Subtotal	\$1,440.00
Shipping & Handling	\$800.00
Grand Total	\$2,240.00

6. Manage Purchase Orders from the Front-end View

Once the vendor creates the PO, the user receives the mail for PO creation, where the user can use the **Continue and Add to Cart** button to place the order directly from the mail as shown in the following figure:



Or the user can log in the user account and follow a certain process to manage the PO and finally place the order.

The user can do the following tasks:

- View the PO
- Cancel the PO
- Approve the PO

To view the PO

1. Go to the Front-end View.
2. In the left navigation panel, click the **My PO** menu.

Account Dashboard	My PO's									
Account Information										
Address Book										
Chat With Live Support Team										
My PO										
My Quotes										
Newsletter Subscriptions										
PO Increment Id	Quote Increment Id	Vendor	Quote Updated Qty	Quote Updated Price	PO Qty	PO Price	Created At	Comments	Status	Action
PO00000182	QO00253	s s	160	1440.00	160	\$2,240.00	2017-07-13 12:41:15		Pending	View

All the POs are listed on the **My PO's** page.

3. To view the PO details of the specific PO, in the **Actions** column, click the **View** link.
The **View PO<PO Num>** page appears as shown in the following figure:

View PO #PO00000182

PO Items Cancel PO Approve PO PENDING

Product Name	SKU	Price	Qty	Subtotal
simplevendor2	simplevendor2	\$1,440.00	Ordered: 160	\$1,440.00
Subtotal				\$1,440.00
Shipping & Handling				\$800.00
Grand Total				\$2,240.00

In the right-upper corner, the status of the PO appears. For example, in the figure, the **PENDING** status is displayed.

4. To cancel the PO, in the right panel, click the **Cancel PO** tab.
5. To approve the PO, in the right panel, click the **Approve PO** tab.
The status appears on the **MY PO's** page based on the action taken by the user.
Pending: When the admin creates the PO.

- **Pending**: When the vendor creates the PO, but no action is taken by the user.
- **Declined**: When the user declines the PO.
- **Add to Cart** link: When the user approves the PO.
- **Ordered**: When the user places the order.

7. Place an Order

Once all the negotiation is completed, the user can place the order by using the **Add to Cart** link displayed in the **Status** column of the **My PO's** page of the user account.

To place an order

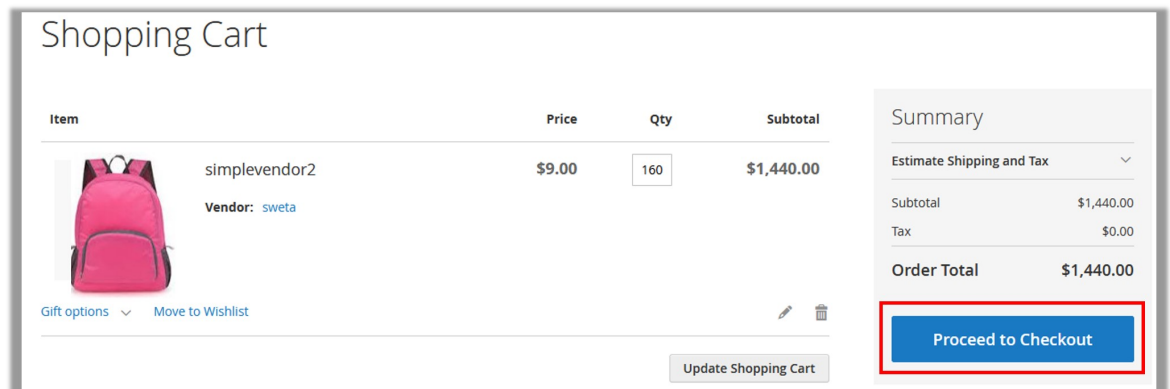
1. Go to the Front-end View.
2. In the left navigation panel, click the **My PO** menu.
The **My PO's** page appears as shown in the following figure:

My PO's

PO Increment Id	Quote Increment Id	Vendor	Quote Updated Qty	Quote Updated Price	PO Qty	PO Price	Created At	Comments	Status	Action
PO00000182	QO00253	s s	160	1440.00	160	\$2,240.00	2017-07-13 12:41:15		PENDING	Add To Cart View

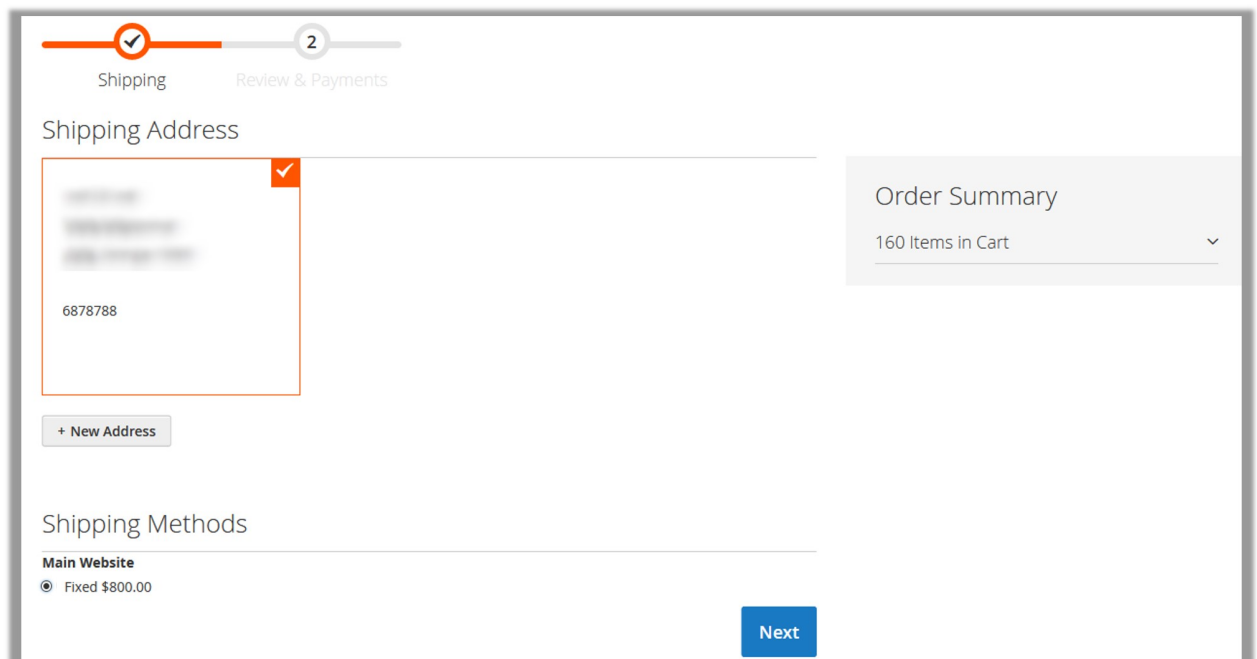
- a. In the **Status** column, click the **Add to Cart** link.

The **Shopping Cart** page appears as shown in the following figure:



3. Click the **Proceed to Checkout** button.

The Shipping Address page appears as shown in the following figure:



4. Click the **Next** button.

The Payment page appears as shown in the following figure.

✓

Shipping

✓

Review & Payments

Payment

Check / Money order

☒ My billing and shipping address are the same

6878788


[Apply Discount Code](#) ▾

Place Order

Order Summary

Cart Subtotal	\$1,440.00
Shipping	\$800.00
Main Website - Multi Shipping	
Order Total	\$2,240.00

160 Items in Cart ^



simplevendor2

Qty: 160

[View Details](#) ▾

\$1,440.00

Ship To:

6878788

Shipping Method:

Main Website - Multi Shipping

5. Click the **Place Order** button.

The order is placed and the message appears as shown in the following figure:

Your order number is: **000000110**.

We'll email you an order confirmation with details and tracking info.

Continue Shopping