



The complete Magento Quotation manager

## Cart2Quote Installation Manual

Version 2.0.0

Support questions: [support@cart2quote.com](mailto:support@cart2quote.com)

Sales questions: [info@cart2quote.com](mailto:info@cart2quote.com)

Website: [www.cart2quote.com](http://www.cart2quote.com)



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## Introduction Cart2Quote | Magento Quotation Extension

Cart2Quote is the most complete Magento module that enables customers and shopowners to create a Request for Quote (RFQ's) on Magento websites. With Cart2Quote you can effectively track customer quotations, edit quotation requests, create proposals and convert quotations to orders. This all via the Front-end or Backend of Magento.

It is recommended you first install the module in a test Magento environment that is a copy of your live store. After you have verified the module works correctly in your test store, you can safely install the module in your live website.



It is recommended to let the module be installed by a technical implementer if you do not have the necessary knowledge of Magento modules' installations. The Cart2Quote module may require some changes to your existing template. [Purchase the installation service.](#)

## Installation Cart2Quote

To protect our intellectual property we have encrypted our software. Therefore you need to have [ionCube](#) installed on your server. Don't know if you have ionCube? Ask your hosting company to find out.

Are you upgrading Cart2Quote? Please first check out [the instructions here.](#)

### 1) Clear all cache

Clear the store cache under var/cache and all cookies for your store domain. Disable compilation for Magento 1.4+. Log out from the Magento Admin. These steps eliminate almost all potential problems. These are necessary steps because Magento relies on cache heavily.

### 2) Backup Your Data

Backup your store database and web directory. You can backup your database through the Magento admin facility under the system-tools-backups menu. Backing up your files can usually be done through the configuration panel of your hosting provider. A database backup is also recommended.



Uninstalling Cart2Quote? Do not test Cart2Quote on a production environment! Always make a backup of your store before the installation. Only install Cart2Quote on a production environment after thorough testing.





### 3) Download and Extract

Download the extension from our website (from your client area in our store) and unzip the extension's contents on your computer and navigate inside the extracted folder.

### 4) Upload Files

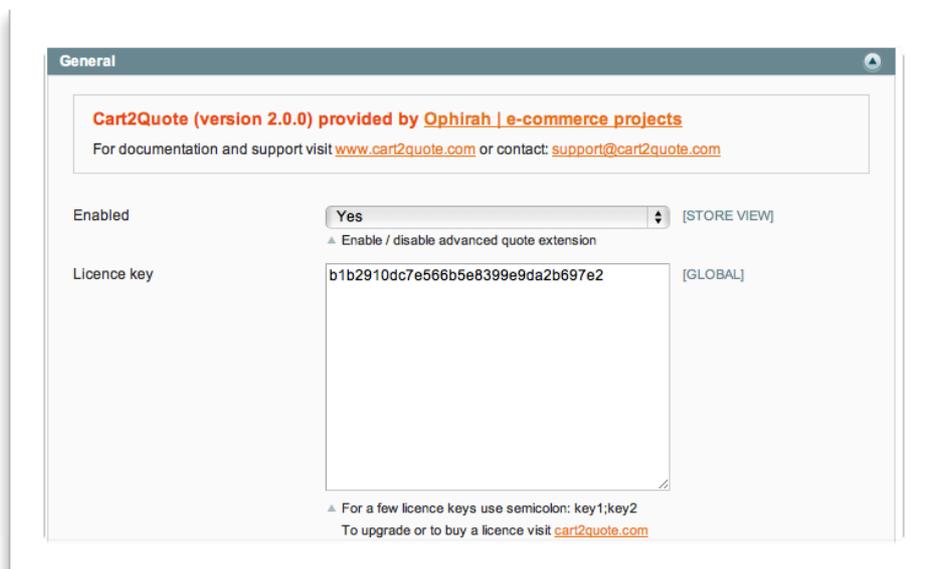
Using your FTP client upload the contents of the Cart2Quote package to your store root. The contents of the directory will look something like this:



You can upload these folders to your Magento root. Your Magento root already contains these folders, by uploading you will add new files to the already existing folders. Make sure you logout from your admin panel next and login again. (else you will see a 404 page)

### 5) Get your license keys

If you have a paid version of Cart2Quote you can utilize all functionalities including those of the backend. [Get your license keys here](#). Without a license you will not be able to create quotes in the Magento admin, create proposals, convert quote into orders, track your leads etc. [Buy your license here](#).



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Most of Cart2Quote's software is open source. Only the PHP files are encrypted. When you have purchased a copy of Cart2Quote only a very small core of Cart2Quote's PHP files are encrypted the rest is open source. [Find out which files are encrypted](#).

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## Configuration after installation

### 1) Set your design

=> Go to System/Cart2Quote/Debug

**Request for Quote** Save Config

- General
- Quote number format
- Emails for Quote Requests
- Attachments
- Debug

Use Cart2Quote template files  [STORE VIEW]

▲ If set to No, you have to manually copy the Cart2Quote template information to you own template files to enable front-end functionality.

When you already have a custom template/theme installed, it is advised to set this option to “No”. Your theme files will not be overwritten by Cart2Quote’s. By selecting “No” you will have to compare Cart2Quote’s template files with your custom theme files and manually paste relevant code in it.

=> Go to System/Cart2Quote/General

List/Grid page activation  [STORE VIEW]

▲ Enable / disable frontend layout update

Detail page activation  [STORE VIEW]

▲ Enable / disable frontend layout update

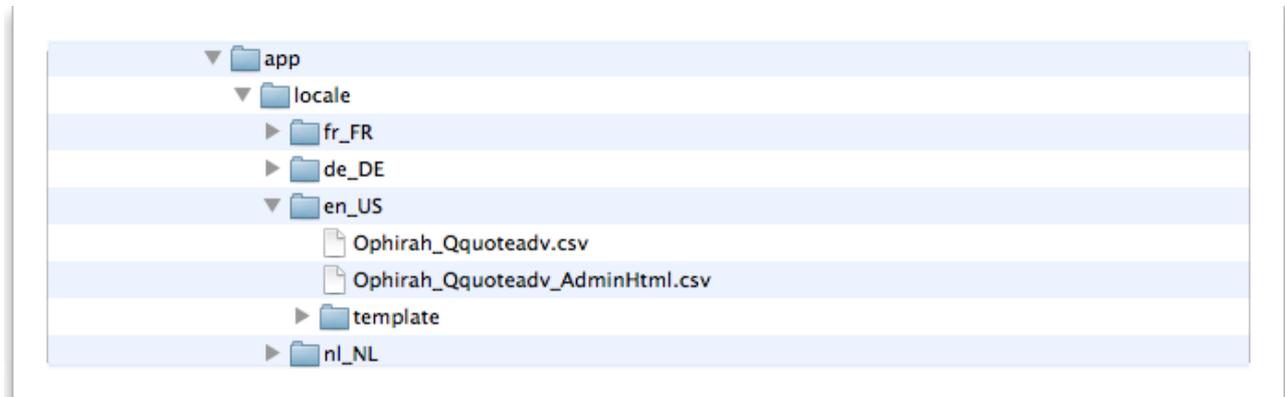
Place the “Add to quote buttons” in your store. It’s best to experiment with this setting. If your design is corrupted by setting these flags to yes, you might need to set this setting to “No” and manually put the code in your theme files. [Find out how.](#)





## 2) Set your language

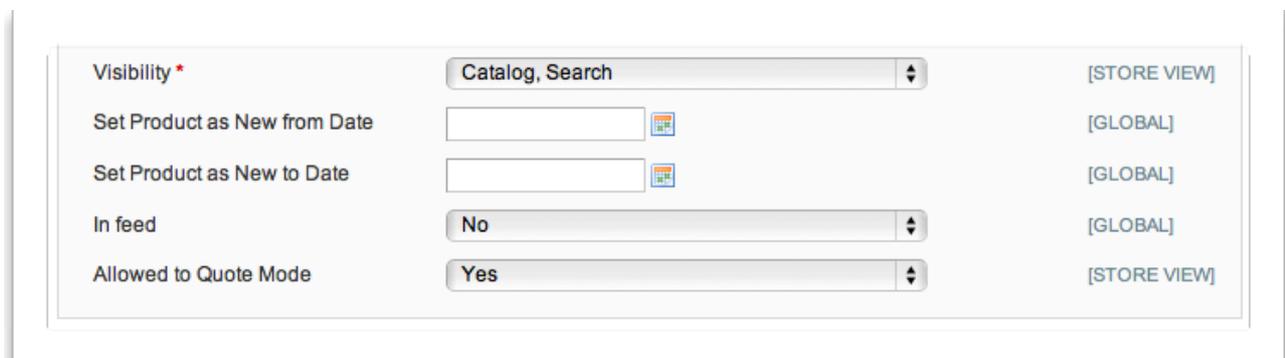
Cart2Quote comes with 4 languages included. If your country\_LANGUAGE folder is missing, please add the Ophirah\_Qquoteadv... files to your country\_LANGUAGE folder and translate them if necessary.



## 3) Test the module

Open a product and set “Allowed to Quote Mode” to “Yes” and Save the page.

=> Go to /Catalog/Manage Products



- \* Make sure the product is enabled, part of a website and category and is in stock
- \* \* Make sure Cart2Quote is enabled also. Go to System/Cart2Quote/General

Go to the front-end (or backend) and add this product to the quotation list, enter your details, submit the form etc. etc.





## Troubleshooting and installation tips

For the latest tips and tricks check our [“Installation and development help”](#) section in our customer support tool. This manual is accompanied by a User manual. In this manual you will find extended help to further configure your quotation module.

### Request for quotation

*“A request for quotation (RFQ) is a standard business process whose purpose is to invite suppliers into a bidding process to bid on specific products or services. RFQ generally means the same thing as IFB (Invitation For Bid)[1].*

*An RFQ typically involves more than the price per item. Information like payment terms, quality level per item or contract length are possible to be requested during the bidding process.*

*To receive correct quotes, RFQs often include the specifications of the items/services to make sure all the suppliers are bidding on the same item/service. Logically, the more detailed the specifications, the more accurate the quote will be and comparable to the other suppliers. Another reason for being detailed in sending out an RFQ is that the specifications could be used as legal binding documentation for the suppliers.*

*The suppliers have to return the bidding by a set date and time to be considered for an award. Discussions may be held on the bids (often to clarify technical capabilities or to note errors in a proposal). The bid does not have to mean the end of the bidding.*

*Multiple rounds can follow or even a Reverse auction can follow to generate the best market price.*

*RFQs are best suited to products and services that are as standardised and as commoditised as possible, as this makes each suppliers' quotes comparable. In practice, many businesses use a RFQ where an RFT or RFI would be more appropriate.[2]*

*An RFQ allows different contractors to provide a quotation, among which the best will be selected. It also makes the potential for competitive bidding a lot higher, since the suppliers could be quite certain that they are not the only ones bidding for the products.*

*Requests for quotations are most commonly used in the business environment but can also be found being applied to domestic markets.”*

From wikipedia, the free encyclopedia

