

Quotes

Through B2B's quote feature, buyers can request an estimate based on a list of products they are interested in. Sellers can evaluate these requests and make adjustments to pricing, discounts, or other criteria before the buyer chooses whether to place the order or not. This allows buyers and sellers to negotiate for large order quantities, offers, and proposals.

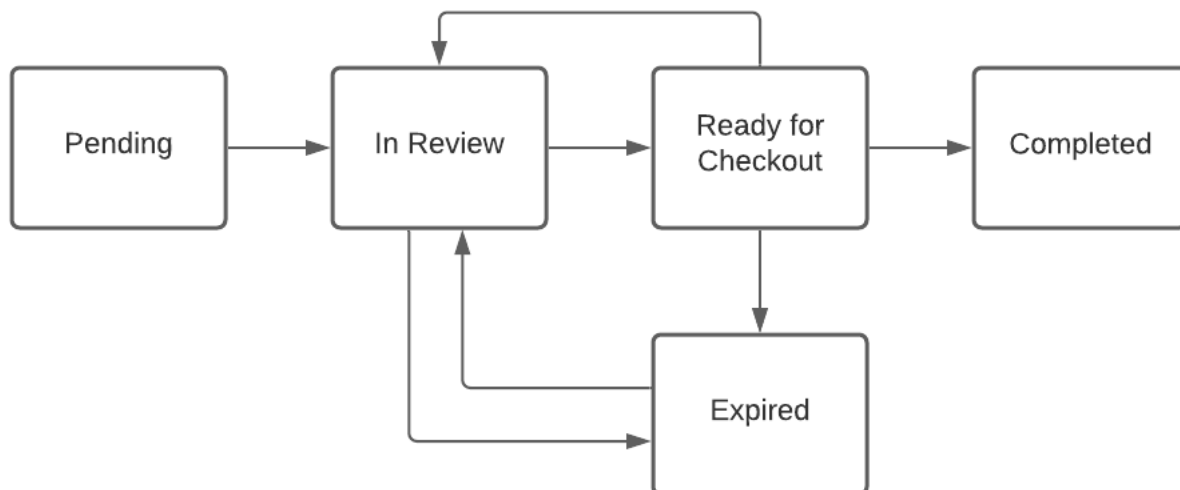
User groups may be useful to organize sales representatives into a "sales" group and a "sales manager" group. This would allow for a custom BPM with several layers of review, such as where a sales representative from the first group can prepare the quote for the buyer and then have their manager review it for final approval.

The Quote Process

When a quote is submitted by a buyer, it goes through a review process that allows the seller to override the product pricing and negotiate changes. The buyer can select their desired products and shipping options, and the seller may adjust the pricing until the buyer is satisfied, opts to cancel, or lets the quote expire. Inventory is reserved for the buyer based on the items in the quote. Once the quote is expired or canceled, then the inventory is released.

During this process, the quote can move through the following statuses. Email notifications are sent to the buyer and seller whenever the quote changes status.

- **Pending:** The buyer has begun creating the quote request but it has not yet been submitted to the seller OR the seller has created a quote for the buyer. Buyers and sellers can edit or delete the quote.
- **In Review:** The buyer has submitted the quote for the seller to review. This could be either a newly created quote or one that the buyer made changes to from the Ready for Checkout state. Only sellers can edit the quote, though both buyers and sellers can delete or email it.
- **Ready for Checkout:** The seller has approved the quote (with or without changes) and it is ready to be turned into an order. Buyers can either checkout or send the quote back for review with additional changes. Either party can delete or email the quote.
- **Completed:** The quote has been turned into an order with one or more items and billing/shipping information and has been submitted for validation. It can no longer be edited or emailed but can still be deleted or copied.
- **Expired:** The quote has reached its expiration date as set on the committed version of the quote. The quote can still be deleted, emailed, or returned to In Review, but not copied.



View Quotes

Quotes can be viewed by both buyers and sellers on their storefront account. Sellers can view the quotes of all B2B accounts that they are assigned to as a sales representative, while buyers can only view quotes for the B2B account that they are logged into.

The Quotes table allows the results to be searched and/or filtered by account, quote number, quote name, date, and current status. Click a column heading in the table to sort the quotes by that column in ascending or descending order.

Quotes

Select Account

▼

Number

🔍

Name

🔍

>

mm/dd/

📅

Filter Status

▼

Account Name	Quote Number	Quote Name	Expiration Date	Created Date	Total	Status
Store A	1466			4/8/2021	\$0.00	Pending
Store B	1455			4/7/2021	\$0.00	Pending
Store C	1445	quote		4/7/2021	\$1045.84	InReview
Store C	1443	Test1443	4/8/2021	4/7/2021	\$99.00	Expired
Store A	1442			4/7/2021	\$0.00	Pending

Showing 1 - 5 of 609 Previous Page [1](#) [2](#) [3](#) [4](#) [5](#) [6](#) ... [122](#) Next Page

Click a quote to view its details or expand the drop-down menu on the far right to view more options. Selecting **Edit Quote** will open the details view in an editable format, similar as to how the quote was created (shown in the next section of this guide). However, the quote will only be editable if it is in a review state that allows the user to edit it.

Status	
InReview	⋮
View Quote	
Edit Quote	⋮
Email Quote	⋮
Delete Quote	⋮

Clicking **Email Quote** will prompt the user to input recipient email addresses. Click **Send** to trigger an email that will provide the recipients with the quote information.

Email Quote ×

Email address(es) (separate emails with a comma)

Email addresses

Cancel

Send

Create a New Quote

Both buyers and sellers can click **Create Quote** above the quotes table to begin building a new quote.

Sellers have the option to search by account, allowing them to create a quote for any of the B2B accounts that they are a sales representative of. The buyer is not able to search accounts, as they can only submit quotes for their own account.

Create Quote

Account Search



This will generate a blank draft of a quote in Pending status. Any B2B-specific pricelists or discounts will be applied if applicable based on the account configurations. The estimated tax for the quoted items is also calculated based on the tax configuration. The quote name can be set in the initial Quote Details section, where a seller can also set an expiration date. Buyers are not allowed to set or edit this expiration date.

(Draft)

Quote Details

Account Name: 123
Quote Number: 1103
Quote Name:
Created Date: 03/24/2021
Created By: call call
Expiration Date:

In the Quote Summary, the buyer can add products using the product lookup and quantity selector on the left as well as apply coupons to the quote. Item pricing can be edited by sellers.

Quote Summary

Product Search

Product	Qty	Fulfillment Type	Unit Price	Discount	Item Total	Remove
---------	-----	------------------	------------	----------	------------	--------

Coupon Code:

▼ Item Total		
Item Subtotal:	\$0.00	\$0.00
Subtracted from Subtotal	\$0.00	
▼ Shipping		
Shipping Subtotal:	\$0.00	\$0.00
Subtracted from Shipping Subtotal	\$0.00	
▼ Handling		
Handling Subtotal:	\$0.00	\$0.00
Subtracted from Handling Subtotal	\$0.00	
▼ Tax and Duty		
Item Tax:	\$0.00	
Shipping Tax:	\$0.00	
Handling Tax:	\$0.00	
Duty Tax:	\$0.00	
Total		\$0.00

When applying adjustments to item prices, the Item Total value and other fees will automatically update to reflect any changes. Use the drop-down next to an item total to select whether the adjustment is an addition, subtraction, or percentage, then enter the amount. The change will be highlighted and the actual price in the Item Total column to the right will update as well as other subtotals and taxes as necessary.

▼ Item Total \$120.00

Item Subtotal: \$110.00

Add to Item Subtotal ▼ 10 \$ %

Added to Subtotal \$10.00

▼ Item Total \$99.00

Item Subtotal: \$110.00

Subtract from Item Subtotal ▼ 10 \$ %

Subtracted from Subtotal -\$11.00

That adjustment is an example of a change that triggers a repricing. During a reprice, the item prices are updated, discounts and other fees are recalculated, taxes are refreshed, and pricelists are reevaluated. Any time the quote is repriced, the quote needs to be submitted/approved for the other party to see the modifications so they can either agree to them or make further modifications. This allows the quote to cycle between the In Review and Ready for Checkout states until the buyer is satisfied with the result or the quote expires.

Both buyers and sellers can initiate a reprice when:

- Item is added/removed
- Item quantity is increased/decreased
- Item fulfillment type changes
- Unit Price changes
- Shipping method changes
- Shipping address changes
- Adjustment changes

In the Comments section of the quote, buyers and sellers can leave comments for each other (up to 250 characters per comment) to communicate during the negotiation process.

Comments

Comments:

Submit

The Quote History will include a log of all updates and status changes for the quote. This history includes the date of each update, the user who updated it, and the data that was changed. It will log any coupons that are applied to the quote, but not discounts.

The image shows a user interface for 'Quote History'. It features a dark grey header bar with the text 'Quote History' in white. Below the header is a large, empty rectangular text area with a light grey border and a vertical scrollbar on the right side. At the bottom of the interface, there are two buttons: 'Submit for Approval' and 'Discard Changes', both with a light grey background and dark text.

At the bottom of the page, click either **Submit for Approval** to begin the review and approval process or **Discard Changes** to undo the edits. Note that the seller will see a **Approve Quote with Changes** button if they perform edits on a pending quote. Submitting the quote will initiate the process for review and approval, while discarding changes will revert any changes from when it was last approved. To fully delete the quote, you must select **Delete Quote** from the main quotes table as shown previously.

If the quote is in the Ready for Checkout state, a buyer will be able to click **Continue to Checkout** to turn the quote into an order. If a buyer makes changes to a quote in this state, they must either submit those changes for a new round of approval or discard changes to proceed with what has already been approved.

Quote Drafts

Drafts allow quotes to be prepared or modified without yet committing to the changes and updating the quote's state. If the draft is discarded, then the quote will return to its original state.

For example, the buyer may have a quote ready for checkout and decide to make some edits to see what the results would look like. If they choose not to go forward with those changes, they can discard the draft and order the unmodified quote. If they choose to move forward with the changes, then the quote would be placed back into review with the seller.