

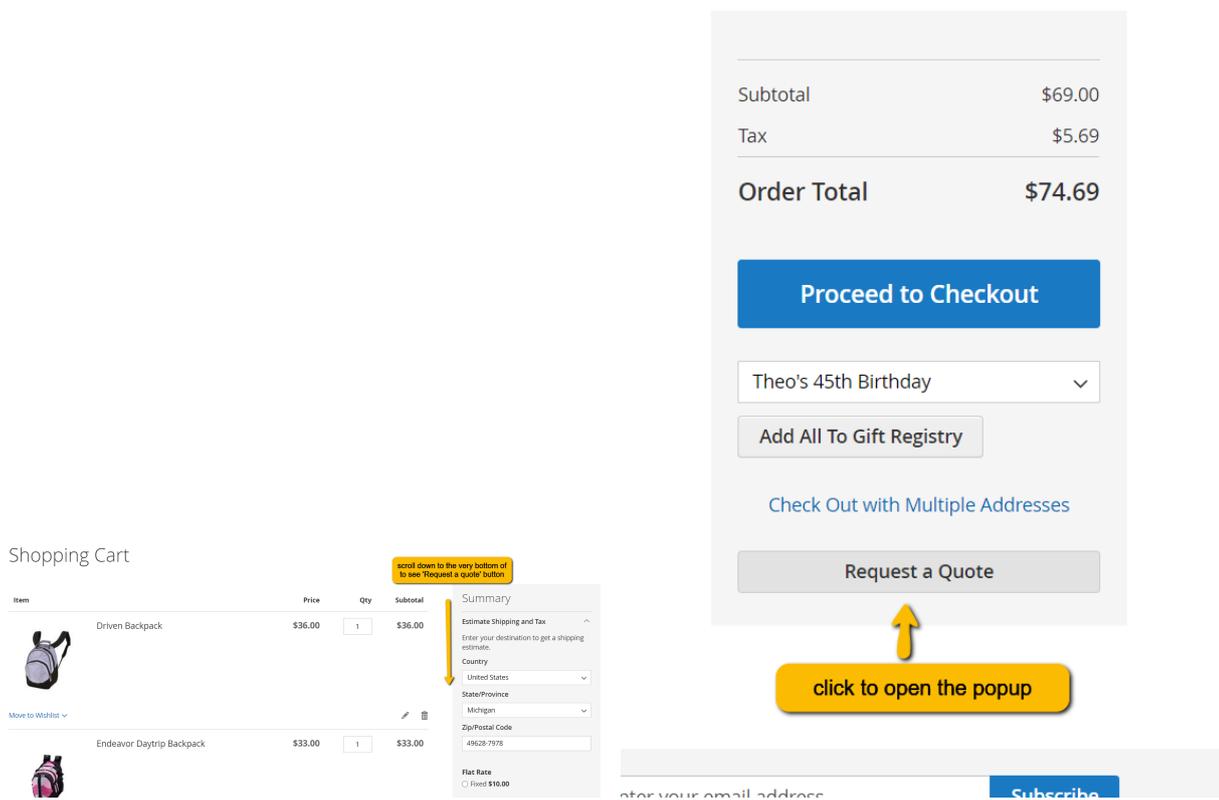
# uMarketplace B2B Negotiable Quote Integration Add-on

## Introduction

This add-on is an integration with Magento B2B Negotiable Quote module. The system utilize customer quote request and present to vendor in the portal his view of the quote. Vendor can see only quote's products (subquote view) that belongs to him and all respective totals and negotiation are presented based on that subquote. Vendor can add comments, change qtys of his products, add new products and set discount that will apply only his part of the quote.

## Customer area

A customer add products to cart as in normal checkout. Then on the 'Edit/View Cart' page Magento B2B Negotiable Quote module adds 'Request a quote' button in the very bottom of the 'Summary' section. By click on this button the system opens 'Request a Quote' popup where a customer add comments, attach files, give quote a name and 'Send request'. At this point the negotiation process is started. A customer gets redirected to his account's 'My Quotes' section. Here he can view the list of his older requests with the latest one. At this point the quote edit is not yet locked and a customer can add another comment, attach extra files, change qty, remove products, select shipping address. He can do this until admin or vendor open the quote. Once this happen it will get locked waiting for admin and/or vendors actions.



A modal window titled "Request a Quote" with a close button (X). It contains a text area for "Add your comment" with the text "test comment". Below it is a text input for "Quote name" with the text "test name". There is an "Attach file" button and two image icons labeled "test1.jpg" and "test2.jpg". At the bottom are "Send Request" and "Cancel" buttons. A yellow callout box at the bottom of the modal says "Fill the form, attach files and 'Send Request'".

A table titled "My Quotes" with columns: Quote Name, Created, Created By, Status, Last Updated, Quote Total, and Action. It lists three quotes with their respective details and a "View" link for each.

Quote Name	Created	Created By	Status	Last Updated	Quote Total	Action
test name	10/27/2020	Veronica Costello	Submitted	10/27/2020	\$74.69	<a href="#">View</a>
utest10271	10/27/2020	Veronica Costello	Updated	10/27/2020	\$215.31	<a href="#">View</a>
utest1026	10/26/2020	Veronica Costello	Submitted	10/26/2020	\$74.69	<a href="#">View</a>

A "Quote" view page showing a table of items quoted. A yellow callout box points to the "Qty" column with the text "change qty, remove products if necessart". The table has columns: Product Name, SKU, Price, Stock, Qty, and Subtotal. Below the table is a summary section with "Catalog Total Price (Excl. Tax)", "Quote Subtotal (Excl. Tax)", "Estimated Tax", and "Quote Grand Total (Incl. Tax)".

Product Name	SKU	Price	Stock	Qty	Subtotal
Driven Backpack	24-WB03	\$36.00	100	1	\$36.00
Endeavor Daytrip Backpack	24-WB06	\$33.00	100	1	\$33.00

Catalog Total Price (Excl. Tax)	\$69.00
Quote Subtotal (Excl. Tax)	\$69.00
Estimated Tax	\$5.69
Quote Grand Total (Incl. Tax)	\$74.69

Shipping Information section with "Shipping Address" and "Shipping Method" sub-sections. A yellow callout box points to the "Shipping Address" field with the text "select address here". Below it is a "Quote Comments" section with an "Add your comment" text area and an "Attach file" button. A yellow callout box points to the comment area with the text "add comment, attach files if missed something during quote request". At the bottom are "Send for Review" and "Proceed to Checkout" buttons.

## Vendor area

Once customer submitted a quote request all vendors who's products exists in the quote get it visible in 'Quotations' page in vendor portal. This page display all quotes which have vendor's products in it with some basic toplevel information. He can filter and sort this list. In quote view box vendor can view more detailed quote information, change products qty, add new products, apply negotiated price, add, comments with attachments. And either 'save as draft' the quote or send applied changes to the customer. Negotiated price set by vendor applies on to his products in quote and won't effect other vendors' products.

The screenshot displays the Unirgy system interface. On the left, a navigation menu includes 'ORDERS', 'STOCK', 'SETTINGS', 'QUOTATIONS', 'IMPORT STOCK', 'IMPORT TRACKING', and 'PRODUCT MANAGER'. Below the menu is a search and filter section with fields for 'Quote Name', 'Company Name', 'Submitted By', and 'Sales Rep'. A 'filter/sort quotes' button is highlighted with a yellow arrow. Below this is a table of quotes with columns for Quote ID, Name, Quote Date, Company, Submitted By, Sales Rep, Quote Total, Negotiated Total, and Status.

The right side of the screenshot shows the detailed view for 'Quote # 37'. It includes 'Customer Info' (Name: test 3 name, Company: Ashan, Status: Submitted, Created: Oct 27, 2020, 12:53:51 PM, Expiration Date: Veronica Costello), 'Items Quoted' (Product Name: Endaceor Daytrip Backpack, SKU: 24-WB06, Stock: 100, Price: \$33.00, Proposed Price: \$33.00, Qty: 1, Subtotal: \$33.00), 'Comments history' (10/27/20, 12:53 PM (Veronica Costello) test 3 comment), and a financial summary (Total Cost: \$0.00, Subtotal (Excl. Tax): \$33.00, Subtotal (Incl. Tax): \$35.72, Discount: \$0.00, Estimated Tax: \$2.72, Catalog Total Price (Excl. Tax): \$33.00). There are also buttons for 'ADD COMMENT', 'SAVE AS DRAFT', and 'SEND'.

## Admin area

Admin area doesn't have any visual changes in regard to original presentation. But some backend logic is affected. Once admin add new products or change qtys respective vendors' subquotes get updated. Note that vendor subquote is not a separate entity. It's just a specific view of the very same quote.

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