

QKits Electronics

store.qkits.com | modules.qkits.com

Quote Module

User Manual

Version 1.1.0

Complete guide to creating, managing, and converting quotes in Magento Admin.

1. Module Overview

The QKits Quote Module adds a complete quotation management system to your Magento admin. Create professional PDF quotes, email them to customers, and convert approved quotes directly into orders — all from within the Magento admin panel. Designed for counter sales, phone orders, and B2B customers.

Feature	Description
Quote Management	Create, edit, and manage quotes with full line-item control
SKU Autocomplete	Type any SKU or partial name — instant product search with CAD prices
PDF Generation	Professional branded PDF quotes with your logo, colours, and company details
Email Delivery	Send quotes directly to customers with PDF attachment
Order Conversion	Convert an approved quote to a Magento order in one click
Customer Lookup	Find existing customers by email or create new ones on the fly
Shipping Rates	Live Canada Post / UPS shipping rate lookup within the quote
Multi-Currency	Full CAD/USD support with live exchange rates
Version Checker	Admin notification when a module update is available

2. Getting to Quotes

The Quote module adds a **Quotes** section to your Magento admin navigation:

Admin Path	What You Can Do
Sales > Quotes	View all quotes, search/filter, open existing quotes
Sales > Quotes > New Quote	Create a new quote from scratch
Stores > Config > QKits > Quote PDF Settings	Configure PDF branding, fonts, colours, company details, and check for module updates

3. Creating a New Quote

3.1 Start a New Quote

Navigate to **Sales > Quotes > New Quote**. The quote form opens with three main sections: Customer, Items, and Shipping/Notes.

3.2 Customer Lookup

Enter the customer's email address in the Customer Email field and click **Look Up Customer**. If the customer exists in Magento, their name and address will fill in automatically. If not, you can create a new customer record by entering their name and address manually and clicking **Create Customer**.

3.3 Adding Items with SKU Autocomplete

The SKU field has full autocomplete. As you type, a dropdown appears showing matching products with their name and current CAD price. You can:

- Type a full or partial SKU (e.g. "ARD" to find all Arduino products)
- Type part of a product name (e.g. "raspberry" to find Raspberry Pi products)
- Use * as a wildcard (e.g. "ESP*" to find all ESP variants)
- Use arrow keys to navigate the dropdown, Enter or Tab to select
- The product details and CAD price fill in automatically on selection

Prices are in Canadian Dollars

All prices displayed in the quote form are already in CAD.

The exchange rate is applied automatically — do not multiply prices manually.

The CAD rate is pulled live from your Magento currency settings.

3.4 Adjusting Quantities and Prices

After selecting a product, you can adjust the **Quantity** and **Unit Price** fields before clicking **Add Item**. You can override the default price — useful for special pricing or negotiations. Items appear in the quote line items table below the entry form.

3.5 Getting Shipping Rates

Enter the customer's shipping address (or use the looked-up address), select the shipping method dropdown, and click **Get Rates**. Live rates from Canada Post and UPS will populate. Select the desired rate to add it to the quote total.

3.6 Saving the Quote

Click **Save Quote** at the top of the form. The quote is assigned an auto-incremented quote number (QK-XXXXX format) and saved to the database. You can reopen and edit saved quotes at any time.

4. Generating a PDF Quote

Open a saved quote and click **Generate PDF** in the button bar at the top. The PDF opens in a new browser tab for printing or saving. You can also click **Print PDF** to send directly to your printer.

4.1 Customising the PDF Appearance

Go to **Stores > Configuration > QKits > Quote PDF Settings** to customise:

Feature	Description
Company Logo	Upload your logo (recommended 200x100px). Set width and height in pixels.
Company Details	Company name, address, phone, and email printed on every quote.
Typography	Choose font family, and set sizes for headers, company name, body text, and tables.
Colours	Header colour, table header background, totals section background, and border/line colour.
Layout	Control top margin, side margins, line spacing, and section spacing.
Watermark	Optional "QUOTE" watermark text behind content. Configurable opacity.
Background Image	Optional subtle background pattern or branding image.
Footer Text	Quote validity period, thank-you message, and custom terms/conditions text.

5. Emailing a Quote to the Customer

Open a saved quote and click **Email Quote**. A confirmation dialog will appear. Click **Confirm** to send the quote email with the PDF attached to the customer's email address on file.

The email includes:

- A professional branded HTML email body with quote summary
- The PDF quote attached as an attachment
- Your store's configured email sender name and address

Email Configuration

The email sender is controlled by your Magento store email settings.

Go to: Stores > Configuration > General > Store Email Addresses

The Quote module uses the "Sales Representative" email address by default.

6. Converting a Quote to an Order

Once a customer approves a quote, open it and click **Convert to Order**. The system will create a new Magento order from the quote items, customer details, and selected shipping method. You will be redirected to the new order.

What Converts Automatically

- All line items and quantities
- Customer billing and shipping address
- Selected shipping method and rate
- Any order notes from the quote
- The quote is marked as converted and linked to the order

After conversion you can process payment, generate an invoice, and ship the order through the normal Magento order workflow.

7. Managing the Quote List

The quote grid at **Sales > Quotes** shows all quotes with filtering and sorting. Available columns include: Quote Number, Customer Name, Customer Email, Grand Total (CAD), Status, and Created Date.

7.1 Quote Statuses

Status	Meaning
Draft	Quote created but not yet sent to customer
Sent	Email with PDF has been sent to customer
Converted	Quote has been converted to a Magento order
Cancelled	Quote has been cancelled and is no longer active

8. REST API Endpoints

The Quote module exposes a full REST API for integration with HAL 9000, external ordering systems, or custom scripts. All endpoints require admin authentication except where noted.

Method	Endpoint	Description
GET	<code>/V1/qkits/quote/:id</code>	Get a quote by ID
POST	<code>/V1/qkits/quote</code>	Save/update a quote
POST	<code>/V1/qkits/quote/create</code>	Create a new quote
DELETE	<code>/V1/qkits/quote/:id</code>	Delete a quote
GET	<code>/V1/qkits/quote/customer/lookup/:email</code>	Look up a customer by email
POST	<code>/V1/qkits/quote/shipping/rates</code>	Get live shipping rates
POST	<code>/V1/qkits/quote/shipping/calculate</code>	Calculate a specific shipping rate
GET	<code>/V1/qkits/quote/:id/pdf</code>	Generate and return PDF
POST	<code>/V1/qkits/quote/:id/email</code>	Email the quote to the customer
POST	<code>/V1/qkits/quote/:id/convert</code>	Convert quote to Magento order

9. Module Updates

The Quote module automatically checks for updates against **modules.qkits.com**. You can see the current version status at:

Stores > Configuration > QKits > Quote PDF Settings > Module Information

Display	Meaning
✓ Up to date (v1.1.0)	Your installed version is current — no action needed
▲ Update available: v1.2.0	A newer version is available. Click the Download link and follow the update instructions.
• Could not reach modules.qkits.com	The version check failed — your store could not contact the update server. The module continues to function normally.

10. Changelog

Version 1.1.0 — 2026-03-13

- Fixed: CAD double-conversion bug — prices were being multiplied by the exchange rate twice
- Fixed: Exchange rate fallback corrected from 1.40 to 1.29
- Fixed: Email REST endpoint security — changed from anonymous to authenticated access
- Added: SKU autocomplete with arrow key navigation, debounce, and auto-search on selection
- Added: Version checker in admin config showing update availability
- Removed: Deprecated setup_version attribute from module.xml
- Removed: Non-standard hal.xml file
- Removed: Leftover .bak files from development

Version 1.0.0 — 2026-01-01

- Initial release

Support

Email	support@qkits.com
Website	modules.qkits.com

Store	store.qkits.com
Phone	(613) 544-6333
Address	2-620 Cataraqui Woods, Kingston, ON K7P-1T8