PROBEGIN

Creating Connections

User manual

iQuote Module

Revision history

Date	Description of Change	Author
May, 8 2017	v. 0.1 Initial Draft	Tessa de Vries

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1. INTRODUCTION

Introduction section explains in general terms the system and the purpose for which it is intended.

1.1 System Overview

WHMCS iQuote is a module that simplifies the process of making professional designed quotes: simple uploading of the client and product details and sending.

WHMCS iQuote allows to:

- Automatically enter your customer's and product's details into quote templates.
- Create a new template for product or service, if needed.
- Write a separate email for each template, including HTML-supported attachments.
- Maintain and manage quotes in multiple languages.
- Manage archive quotes and keep your quotes up to date.
- Create specifically-tailored corporate style of the quotes layout.

1.2 System Configuration

iQuote is compatible with WHMCS 6.x.x and 7.x.x. WHMCS 7.x supports PHP 5.6. The application requires connection to Internet in order to save data to database. Data saved in database can be seen using any major Internet browsers.

1.3 User Access Levels

Management options consist of activating and deactivating of the module. Access control allows full admin to define which of the roles can access the module (Configure stage).

2. GETTING STARTED

This guide will walk you through the basics of using iQuote including how to create an email templates and send your contacts.

2.1 Installing iQuote

Installing iQuote Module is very simple. The following steps will guide you through the process:

1. Upload the **iQuote.zip** file to your server into **/modules/addons**
2. Unzip the contents of the zip file.
3. Login to the WHMCS Admin Area and configure your module (see the next unit).

2.2 Activate the Module

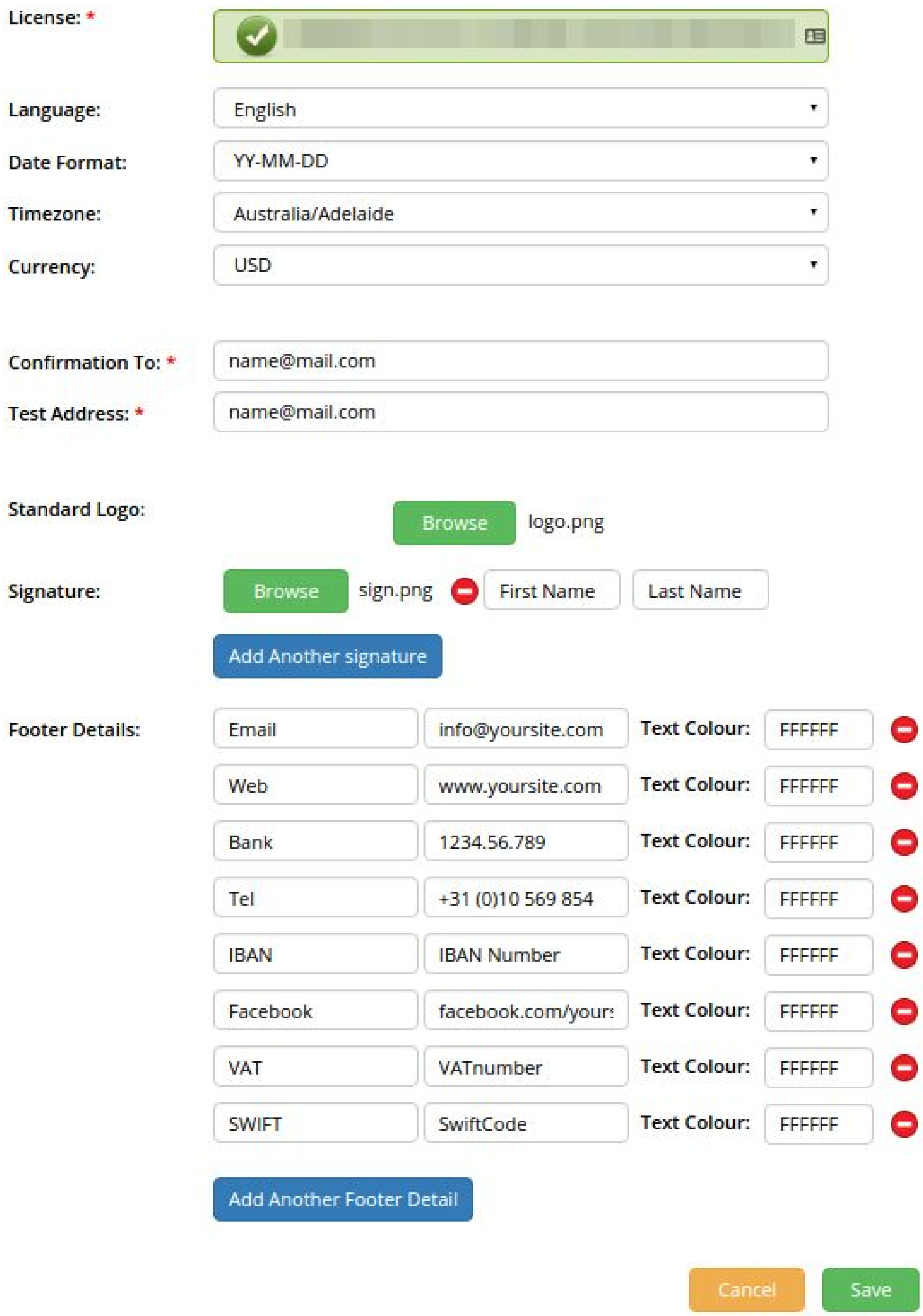
To activate iQuote Module:

1. Hover the **Setup** tab.
2. Click on the **Addon Modules**.
3. Click on the **Activate** button near the **iQuote**.

4. Click on the **Configure** button.
5. Select roles which can access the module (**Full Administrator** is recommended).
6. Click on the **Save Changes** button.

2.3 Settings tab

Users must be licensed. License key can be added and data adjusted on **Settings** tab:



1. Hover the **Addons** tab and click on the **iQuote** module.
2. Go to **Settings** tab.

3. Fill the **License Key** field in order to use all the features within this module.
4. Select the **Language**: English or Dutch.
5. Choose a **Date Format, Timezone and Currency**.
6. Fill the **Confirmation To** field to get email when your quote is sent and set the **Test Address** where all test letters will be sent to.
7. Choose and upload your **Standard Logo**.
8. Add/Edit your **Signature**:
    - Enter your First Name and Last Name.
    - Choose a file for your signature.
9. Add/Edit the **Footer Details** fields.
10. Click on the **Save** button.
11. Discard all changes by pressing the **Cancel** button.

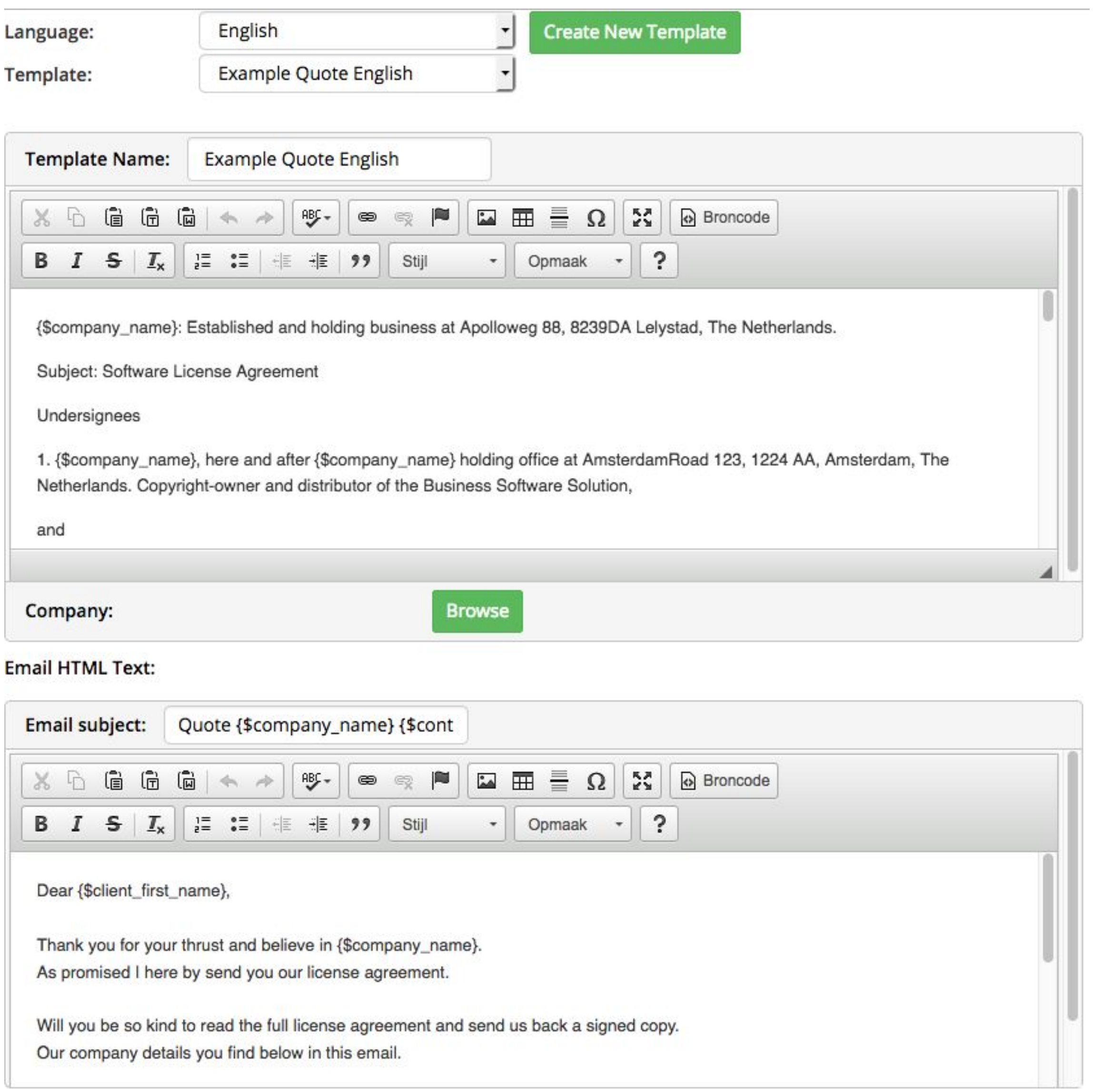
Congratulations! Your iQuote module is ready to use.

3. USING THE MODULE

WHMCS iQuote is the module to send clients reminders about for there quotes.

3.1 Template tab

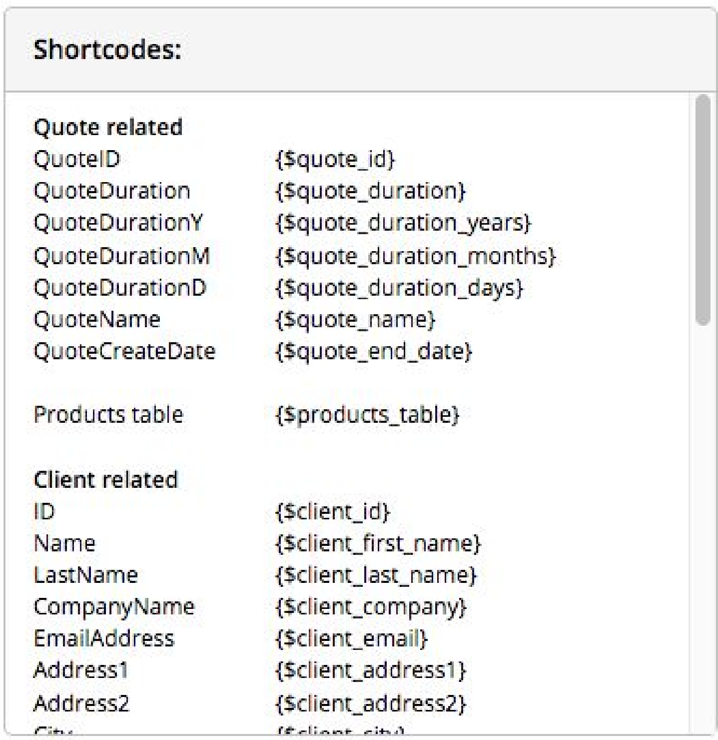
To create or edit standard templates, follow the steps below:



1. Select **Language** (English or Dutch) for your template.

2. Adjust new template by clicking on the **Create New Template** button or edit an existing by choosing available in the **Template** field:

    - Fill in a **Template Name** and **Email subject**.
    - Enter and format text of the quote and email in text box.
    - Browse **Company** logo.
    - Use the **Shortcodes** - template variables to insert quote information.



3. Save the template by clicking the **Save** button.

4. Discard all changes by pressing the **Cancel** button.

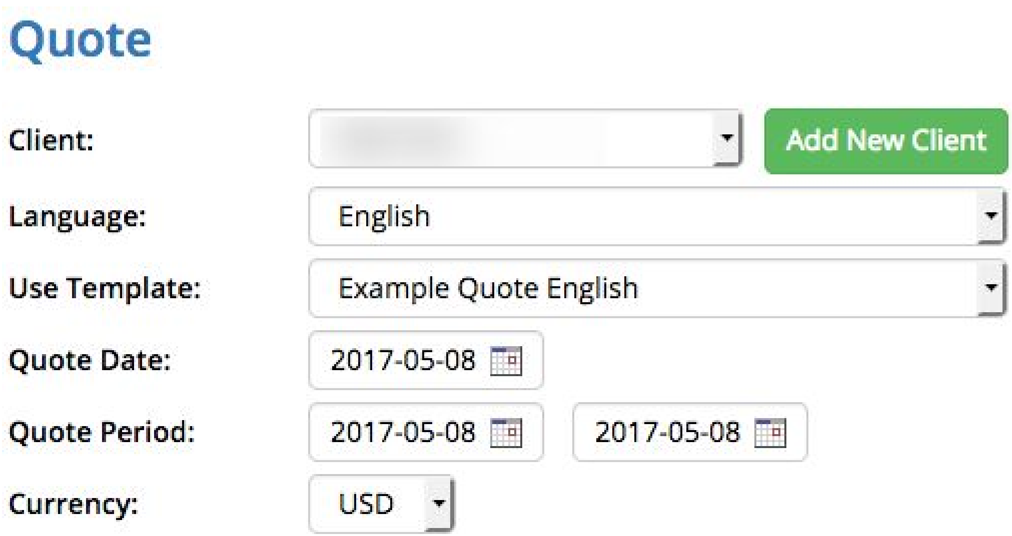
5. Check quote in PDF format by pressing the **Download PDF** button.

6. Remove chosen template by clicking on the **Delete** button.

3.2 Create quote

The quote can be created by adjusting the Contractual Products you want to send to the Client in the **Quote** tab.

General Quote information set up:



1. Choose the **Client** or **Add New Client**.
2. Select **Language** of the quote (languages can be set through Settings).
3. Choose **Use Template** for the quote (templates can be set on **Templates** tab).
4. Set a **Quote Date** by selecting it in the calendarpicker.
5. Set a **Quote Period** by selecting range in the datepickers.
6. Choose the **Currency** (currencies can be set through Setup > Payments > Currencies).

Contractual Products set up:

Contractual Products	Hours	Price Per Hour	Setup Fee	Discount %	Total	Recurring	Taxed
Product 1	1	20.00	2.00	10	20.39	Monthly	✓
+ Add new line							
						SUBTOTAL $	19.80
					3.00	VAT	$ 0.59
						TOTAL $	20.39

1. Select **Contractual Products** you want to send.
2. Custom values of **Price Per Hours, Setup Fee** can be entered. Default values for each **Recurring** option are defined in *Setup > Product Services > Product Services > Quote Product > Pricing*.
3. Fill **Hours** (1 - is default value), **Discount %** fields
4. **Total** and **SubTotal** are calculated by system.

   *Total***=***Hours***×***PricePerHours***+***SetupFee***-***Discount%***+***Taxed*.

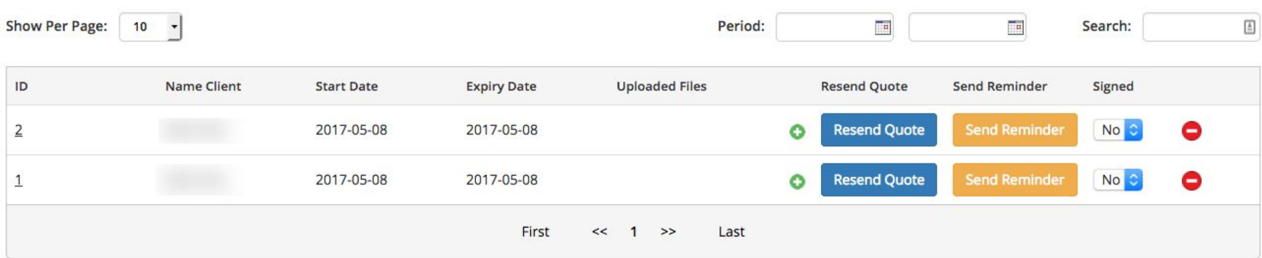
   *SubTotal***=***Hours***×***PricePerHours***+***SetupFee***-***Discount%*.
5. Select checkbox in the **Taxed** column to include tax (VAT) for this product.
6. Uncheck the boxes in Hours Price, Price Per Hours, Setup Fee, Discount % and Recurring columns if you do not want to display these data in the quote PDF.
7. Click on the link **Add New Line** to add another product.
8. Remove the line by clicking on the **Delete** icon on the product line.

Sending quote:

1. A preview of the quote can be opened by clicking the **Download PDF** button under the table.
2. Send a test version of the quote and email it to your mailbox (mailbox can be set in settings) by pressing the **Test Send** button.
3. Send the quote to client by clicking the **Send Quote** button.

3.3 Archive tab

All quotes which were sent are available in the **Archive** tab. You can overview and manage of all sent items of the quotes:



1. Select the quantity of items to **Show Per Page** (10, 25, 50, 100).
2. Filter data using **Search** by ID, Name Client, Start Date or Expiry Date and **Period** datepickers by Start Dates.
3. **Sort** data by ID, Name Client, Start Date or Expiry Date.
4. **Download** a quote that was sent to your client by clicking on the **ID** number of the exact quote.
5. You can upload new document for a quote by clicking button (for e.g. document that approve that quote was signed) in the **Uploaded Files** column. Click on the **Save** button.
6. If there is a file in the Uploaded Files column, you can **Download** by clicking on the button or Delete by pressing on the button this selected document.
7. You can resend the quote to your client by pressing on the **Resend quote** button and **Save** changes.
8. Send reminder to your client by clicking on the **Send Reminder** button and **Save** data.
9. Hover mouse the **Resend Quote** and **Send Reminder** buttons and you can check when it was sent previously.
10. Remove the quote data by clicking on the **Delete** icon.

11. Mark a quote as signed/not signed by selected **Yes/No** in the **Signed** column and pressing the **Save** button.
12. Check the **Pagination -** go to other pages using First, Last, Previous, Next links and page numbers link.
13. Discard changes by pressing the **Cancel** button.