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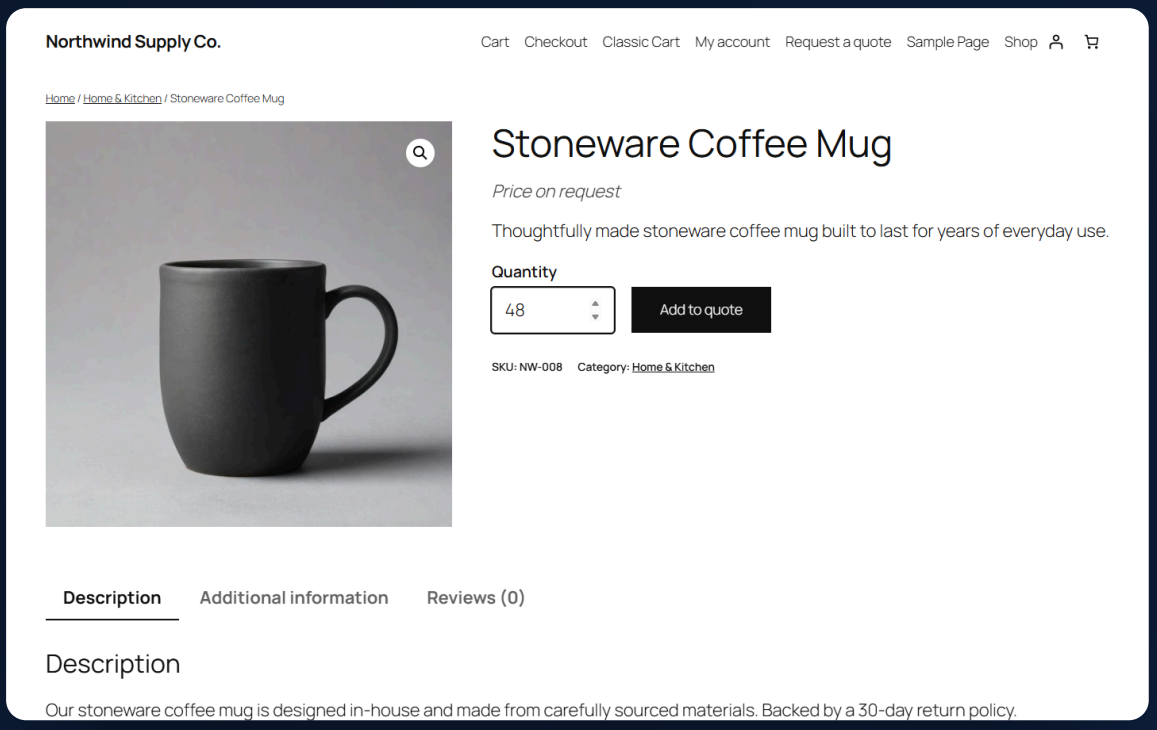
WOOCOMMERCE PLUGIN · USER GUIDE

Quoteloom — Catalog Mode & Request a Quote for WooCommerce

Version 1.0.0 · Installation, licence activation, every setting explained, FAQ and troubleshooting.



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Quoteloom — Catalog Mode & Request a Quote for WooCommerce

User guide for version 1.0.0 (Free and Pro).

Quoteloom turns all or part of a WooCommerce store into a catalogue: prices and the Add to cart button are replaced by "Price on request" and a quote button. Shoppers send a quote request, you get an email, and (Pro) you price the request, send a quote with a PDF, and the customer accepts it online and pays the order at your prices.

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1. Installation

1. Make sure WooCommerce 8.9 or newer is active.
2. Go to **Plugins** → **Add New** → **Upload Plugin**, choose `quoteloom.zip` (Free) or the Pro zip from your Code Craft account, click **Install Now**, then **Activate**.
3. A new **Quotes** menu appears in wp-admin.

Replacing Free with Pro: deactivate and delete the Free plugin, then install Pro. Your settings and quotes are kept unless you ticked "Delete all plugin data when the plugin is deleted".

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2. Activate your Pro licence

1. Open **Quotes** → **Licence**.
2. Paste the licence key from your purchase email and click **Activate**.
3. Pro features unlock at once. Each key works on one live domain.

Monthly and yearly keys: three days before the end you see a notice. If the key ends, Pro features pause (see section 8) and come back as soon as you renew and click **I have paid — check again**. Lifetime keys do not end.

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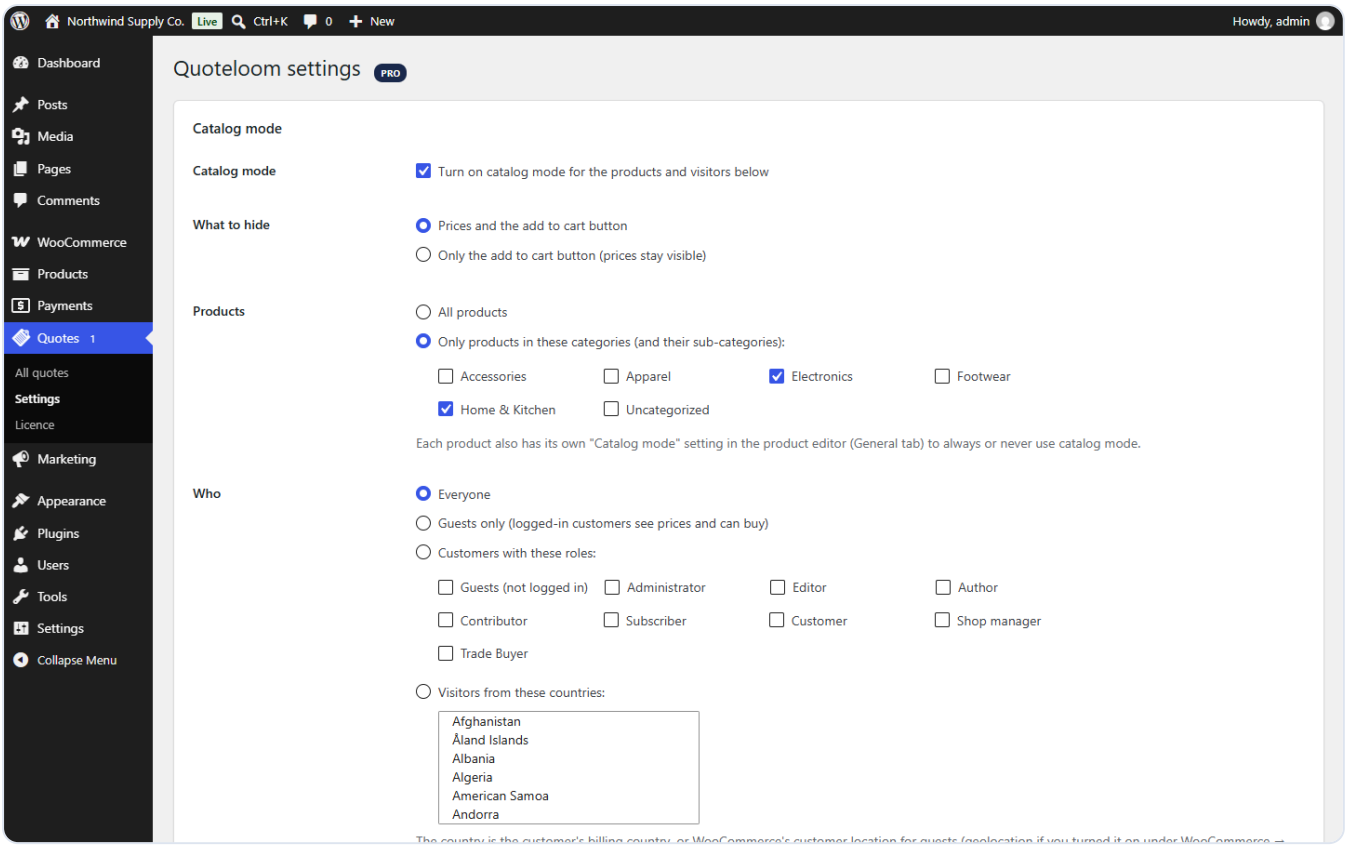
3. Settings (Quotes → Settings)

Screenshot: .



Catalog mode

- **Catalog mode** — turns the rules below on or off. Per-product overrides (section 4) work either way.
- **What to hide** — *Prices and the add to cart button*, or *Only the add to cart button* (prices stay visible).
- **Products** — *All products*, or *Only products in these categories*. Sub-categories of a ticked category are included.
- **Who**
  - *Everyone*
  - *Guests only* — logged-in customers see prices and can buy.
  - *Customers with these roles* (Pro) — tick roles; tick "Guests (not logged in)" to include visitors who are not logged in.
  - *Visitors from these countries* (Pro) — the country is the customer's billing country; for guests it is WooCommerce's customer location (geolocation if you turned it on in WooCommerce → Settings → General, otherwise your store's country).
  - *Always show prices to these roles* (Pro) — for example a wholesale or trade role. These customers always see prices and can buy.
- **Text instead of the price** — for example "Price on request" or "Call for price". Leave empty to show nothing.

Quote requests

- **Quote button** — show the quote button and form on catalog mode products.

- **Button text** — the text of the shop button and the form button (default "Request a quote").
- **How customers ask** — *Enquiry form on each product page* (Free), or *Quote basket* (Pro): customers add several products and send one request from the quote basket page.
- **Quote basket page** (Pro) — the page with the `[qdcm_quote_basket]` shortcode. Pro creates a "Request a quote" page for you the first time it runs. Customers also open and accept their quotes on this page.
- **Phone field** — optional, required or hidden.
- **Thank-you message** — shown after a request is sent.
- **Send requests to** — the email address that receives requests (the site admin email if empty). The email's Reply-To is the customer, so you can answer straight from your inbox.
- **Customer confirmation** — email the customer a copy of their request.
- **Quotes are valid for** (Pro) — the default expiry of a sent quote, in days.
- **Uninstall** — delete all plugin data when the plugin is deleted (off by default).

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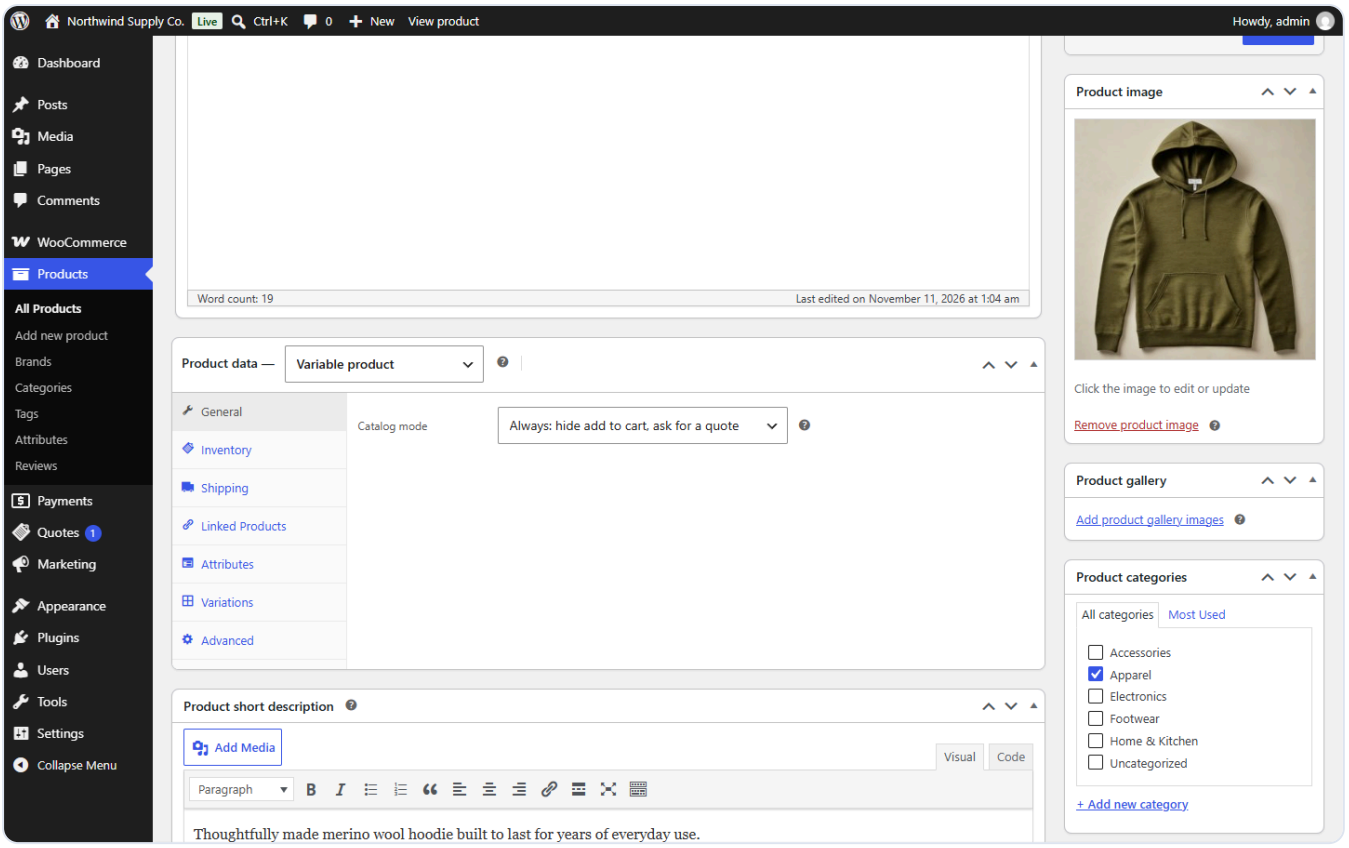
4. Per-product catalog mode

Edit a product. In the **General** tab, **Catalog mode** has three choices:

- *Follow the Quoteloom rules* (default)
- *Always: hide add to cart, ask for a quote* — for made-to-order products. This applies to every visitor, whatever the "Who" setting.
- *Never: always sell normally*

Screenshot: .



5. What shoppers see

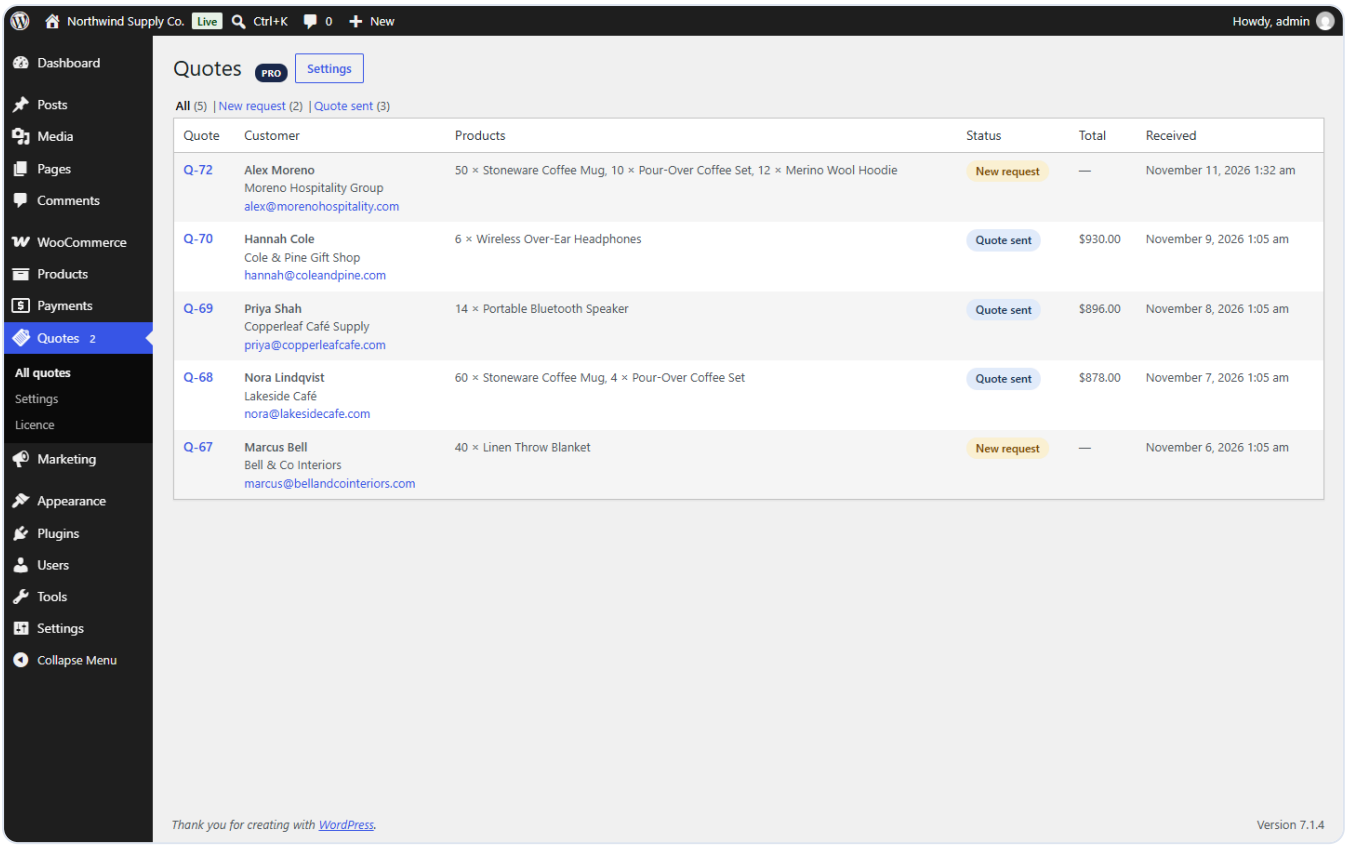
- In the shop, a catalog mode product shows your price text and a **Request a quote** button that opens the product page at the quote form. Screenshot: `pro-05-shop-catalog-mode.png`.
- On the product page, the Add to cart form is replaced by:
  - the **enquiry form** (Free, or Pro with the single form): options for variable products (for example Colour and Size), quantity, name, email, phone, company and message. Screenshot: `pro-15-enquiry-form.png`.
  - or, with the Pro quote basket, **Add to quote** with options and quantity. Screenshot: `pro-06-product-add-to-quote.png`.
- The quote basket page lists the products with quantities you can change or remove, and the contact form. Screenshot: `pro-07-quote-basket.png`.

Hidden prices are removed at the source, so they are also hidden in the WooCommerce Store API (used by the Cart and Checkout blocks and by headless front ends), and the Store API refuses to add a catalog mode product to the cart.

Spam protection: a hidden field that bots fill in and a limit of five requests per visitor in ten minutes. There is no CAPTCHA.

6. Handling quotes (Quotes → All quotes)

Screenshot: .



Every request is listed with the customer, products, status, total and date. Filter by status at the top. Statuses: New request, Quote sent, Accepted, Declined, Expired, Closed.

Open a request to see the products (with options), the customer's details and message, and the history.

- **Free:** reply by email with the **Reply by email** button, and change the status by hand.
- **Pro:** price the quote:
  1. Enter **Your unit price** for every line (the list price is shown for reference). You can also change quantities.
  2. Optional: a **Shipping / delivery charge**, a **Note to the customer** and the **Valid until** date.
  3. Click **Save draft**, or **Save and send quote to customer**. Screenshot: `pro-09-price-quote.png`, after sending: `pro-10-quote-sent.png`.
  4. The customer gets an email with the prices, the total, the expiry date, a **View and accept your quote** button and a PDF copy of the quote attached. **Preview PDF** shows the same PDF.

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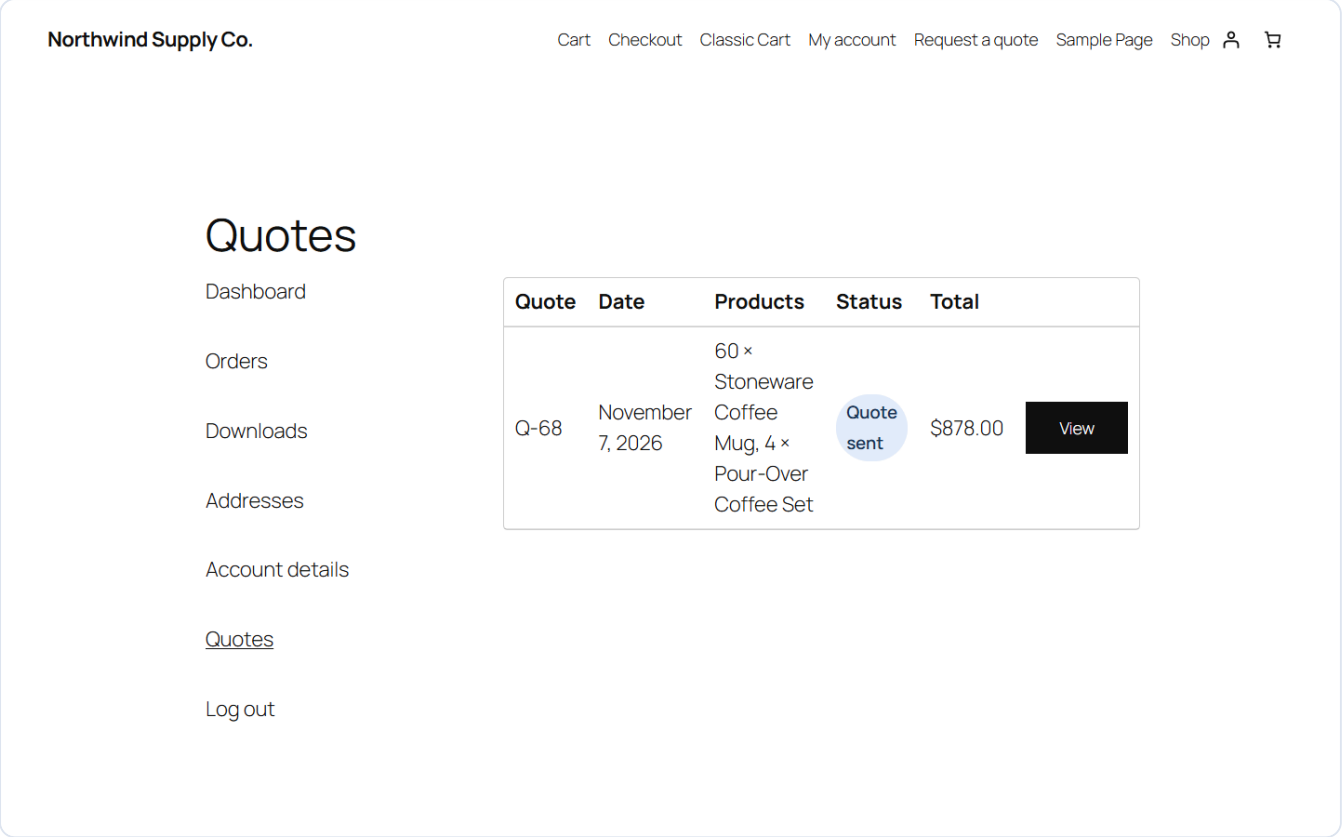
7. Accepting and paying (Pro)

1. The customer opens the link in the email and sees the quote with a **Download PDF** link, **Accept and pay** and **Decline**. Screenshot: `pro-11-customer-quote.png`.
2. **Accept and pay** creates a pending WooCommerce order with your quoted unit prices, the quoted shipping and the customer's details, and opens the order payment page, where they pay with any of your payment methods. Screenshot: `pro-12-order-pay.png`.

3. The quote is marked **Accepted**, linked to the order, and you get an email. Screenshot: `pro-13-accepted-quote.png`.
4. **Decline** marks the quote Declined and emails you.
5. After the **Valid until** date the quote expires and can no longer be accepted (checked whenever the quote is opened, plus a daily scheduled check).

If the request came from a logged-in customer, the order belongs to their account and WooCommerce asks them to log in before paying.

Customers with an account find all their quotes under **My Account** → **Quotes**. Screenshot: .



8. When a Pro licence ends

The Pro features pause; nothing is deleted:

- The quote basket is replaced by the single enquiry form.
- Role and country rules stop applying (catalog mode then only follows the Everyone / Guests only rules and per-product settings), and "Always show prices to these roles" stops.
- You can no longer price or send quotes, and customers cannot accept quotes or open the My Account tab until you renew.

Free features keep working.

9. FAQ

Does it hide prices in the Cart and Checkout blocks? Yes — the price is removed from WooCommerce's own price, so the Store API behind the blocks has no price and refuses to add the product.

Can taxes be added to a quote? Quote prices exclude tax. When the customer accepts, WooCommerce calculates tax on the order as usual if taxes are on.

Can I edit a quote after sending it? Yes. Change the prices and click Save and send again; the customer gets the updated quote. Accepted quotes are locked.

Can the customer change quantities after receiving the quote? No. They can ask you for a new quote.

Does it work with page caching? The product pages for guests can be cached. The quote basket page should be excluded from the page cache (most cache plugins do this for pages with a WooCommerce session cookie).

10. Troubleshooting

- **No emails arrive:** Quoteloom sends through WordPress (wp_mail) with the WooCommerce email template. If other WooCommerce emails do not arrive either, install an SMTP plugin.
- **The quote button does not show:** check that "Quote button" is ticked and that the product is in catalog mode for the visitor (log out to test as a guest).
- **"Your session expired" after sending the form:** the page was served from a cache for too long. Exclude product pages with quote forms from long cache times, or reload the page.
- **My Account → Quotes gives a 404:** go to Settings → Permalinks and click Save once.