

# DeDanix Quote Builder for WooCommerce

A product guide for stores that need to turn quote requests into reviewable quotations, professional PDFs and WooCommerce orders.

| Area              | Summary   |
|-------------------|---|
| <b>Free + Pro</b> | Quote requests, customer portal, Pro workflows and WooCommerce checkout.                                  |
| <b>Best for</b>   | B2B stores, distributors, custom pricing, sellers and quote-driven operations.                            |
| <b>Support</b>    | Use <a href="mailto:dev@dedanix.com">dev@dedanix.com</a> for license, installation and technical support. |

Version 1.4.2 - Commercial release guide

# Product summary

DeDanix Quote Builder for WooCommerce helps stores receive quote requests with minimum customer data, review commercial conditions, issue polished PDF documents, send customer emails and convert accepted quotes into WooCommerce orders.

| Role                 | What they can do  |
|----------------------|---|
| <b>Customer</b>      | Send a quote request, review issued quotes in My Account, download documents and accept, reject or request changes. |
| <b>Seller</b>        | Work from the backend or a simpler frontend interface to review, edit, send PDFs and move quotes forward.           |
| <b>Administrator</b> | Configure styles, PDF templates, Pro rules, emails, expirations, taxes, shipping and WooCommerce integration.       |

## Free vs Pro

| Area              | Free                     | Pro  |
|-------------------|--------------------------|--|
| <b>Requests</b>   | Base quote request form. | Minimum commercial data, tax exempt request and shipping estimate.           |
| <b>PDF</b>        | Basic quote document.    | Advanced branding, templates and per-quote template selection.               |
| <b>Emails</b>     | Essential notifications. | Commercial quote emails, reminders and resend workflow.                      |
| <b>Sales flow</b> | Base quote management.   | Accept, reject, request changes, checkout, order conversion and audit trail. |
| <b>Team</b>       | Administrator workflow.  | Seller/admin roles and optional frontend seller workspace.                   |

## Recommended quote workflow

| Step | Action  | Result  |
|------|---|---|
| 1    | Customer or seller creates a quote request.   | The quote starts pending review.                                    |
| 2    | Seller reviews products, discount, shipping, tax exempt request and commercial terms. | The quote becomes a controlled commercial proposal.                 |
| 3    | A PDF is generated and the quote is emailed to the customer.                          | The customer receives a document and decision link.                 |
| 4    | Customer accepts, rejects or requests changes.  | The decision is recorded for audit and follow-up.                   |
| 5    | Accepted quote continues to checkout or converts to an order.                         | WooCommerce collects full billing and shipping details at checkout. |

## Minimum data before the sale

A quote should not require full billing details before the customer decides to buy. The essential information is the name of the person or company being quoted, contact email, optional tax exempt request, and shipping location only when a shipping estimate is needed.

- Billing address, phone and full shipping details are completed later in WooCommerce checkout.
- Tax exempt evidence can be requested before issuing the quote when the store needs it.
- City, state and country are only needed when calculating estimated shipping.

## PDF and email workflow

- Configure the global PDF style and branding in Pro settings.
- Use per-quote PDF template selection when a specific quote needs a different design.
- Send the PDF by email from the workflow screen and resend when required.
- Customer links allow review, acceptance, rejection or change requests from My Account.

# Configuration checklist

## Before going live

- Install and activate the Free plugin.
- Install and activate Pro.
- Activate a commercial license.
- Review PDF branding, emails, seller permissions and checkout flow.

## WooCommerce setup

- Make sure products, cart, checkout, account pages and payment methods are configured.
- Use PayPal or another WooCommerce-compatible gateway.
- Complete a real test order before opening sales.

## Operational testing

- Create a quote from the frontend.
- Issue PDF and email.
- Accept and reject quotes.
- Convert an accepted quote to checkout/order.
- Test tax exempt, discounts, shipping and quote editing.

## Support

For help, write to [dev@dedanix.com](mailto:dev@dedanix.com). Include purchase email, order number, licensed domain, WordPress and WooCommerce versions, Free and Pro versions, screenshots and steps to reproduce the issue.

## Useful links

|                      |   |
|----------------------|---|
| <b>Product</b>       | <a href="https://dedanix.com/quote-builder/">https://dedanix.com/quote-builder/</a> |
| <b>Documentation</b> | <a href="https://dedanix.com/documentation/">https://dedanix.com/documentation/</a> |
| <b>Demo hub</b>      | <a href="https://demo.dedanix.com/">https://demo.dedanix.com/</a>                   |
| <b>Support email</b> | <a href="mailto:dev@dedanix.com">dev@dedanix.com</a>                                |