

Dealer Inquiry for Magento 2

User Guide

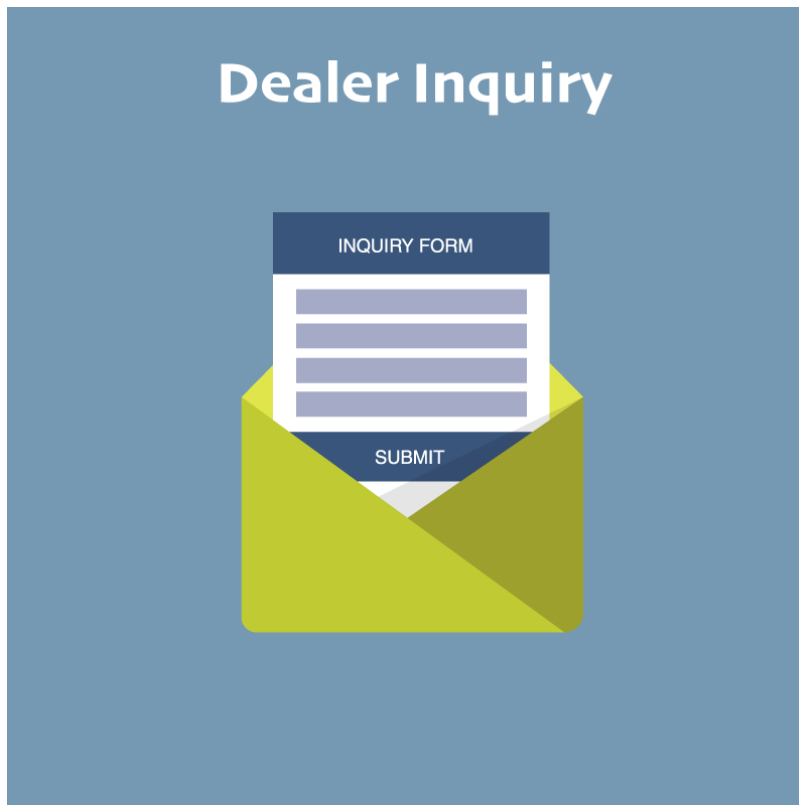


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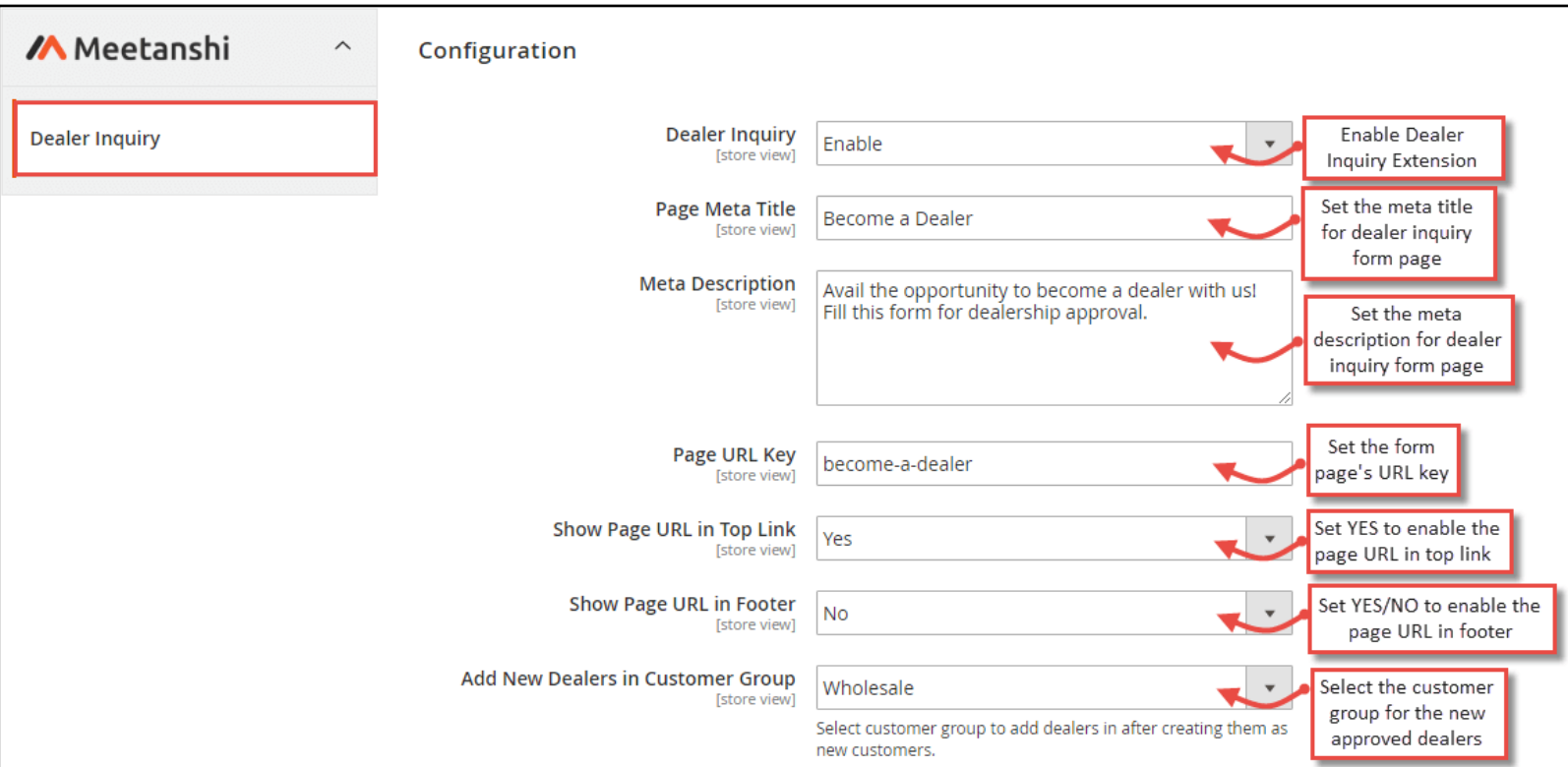
1. Extension Installation

- Extract the zip folder and upload our extension to root of your Magento 2 directory via FTP.
- Login to your SSH and run below commands step by step:
 - php bin/magento setup:upgrade
 - For Magento version 2.0.x to 2.1.x - php bin/magento setup:static-content:deploy
 - For Magento version 2.2.x & above - php bin/magento setup:static-content:deploy -f
 - php bin/magento cache:flush
- That's it.

2. Configuration

To configure the extension, login to Magento 2 backend, move to **Stores → Configuration → Dealer Inquiry** where you can find various settings to configure the extension.

- **Dealer Inquiry:** Enable the extension from here.
- **Page Meta Title:** Enter page meta title.
- **Meta Description:** Add page meta description to make it SEO friendly.
- **Page URL Key:** Enter the URL key for dealer inquiry form page.
- **Show Page URL in Top link:** Set YES if the page URL is to be displayed in the top link.
- **Show Page URL in Footer:** Set YES if the page URL is to be displayed in the footer.
- **Add New Dealers in Customer Group:** Select the customer group to add new dealer customer account for the approved dealers.



The screenshot shows the Magento 2 Configuration page for the Dealer Inquiry extension. The left sidebar has a red box around the 'Dealer Inquiry' menu item. The main configuration area has several settings, each with a red callout box explaining its purpose:

- Dealer Inquiry [store view]:** Set to 'Enable'. Callout: 'Enable Dealer Inquiry Extension'.
- Page Meta Title [store view]:** Set to 'Become a Dealer'. Callout: 'Set the meta title for dealer inquiry form page'.
- Meta Description [store view]:** Set to 'Avail the opportunity to become a dealer with us! Fill this form for dealership approval.'. Callout: 'Set the meta description for dealer inquiry form page'.
- Page URL Key [store view]:** Set to 'become-a-dealer'. Callout: 'Set the form page's URL key'.
- Show Page URL in Top Link [store view]:** Set to 'Yes'. Callout: 'Set YES to enable the page URL in top link'.
- Show Page URL in Footer [store view]:** Set to 'No'. Callout: 'Set YES/NO to enable the page URL in footer'.
- Add New Dealers in Customer Group [store view]:** Set to 'Wholesale'. Callout: 'Select the customer group for the new approved dealers'.

3. Form Settings

- **Form Options**

- **Form Title:** Set the form title.
- **Form Description:** Enter the form description.
- **Submit Button Label:** Set the label for the submit button.
- **Form Submission Success Message:** Enter the message to be displayed on successful form submission.
- **Show Form Fields:** Select the form fields to enable it in the frontend.
- **Allowed Upload File Types:** Add the file types to be allowed to attach with the form.

Form Settings

Form Options

Form Title [store view] Dealer Inquiry Set the Form Title

Form Description [store view] Submit the form to apply for a new dealership account Enter the Form Description

Add text to show under the Dealer Inquiry form title.

Submit Button Label [store view] submit Set the label for submit button

Set label for form submit button.

Form Submission Success Message [store view] Your request has been submitted successfully. Enter the message to be displayed on successful form submission

Show Form Fields [store view] Tax/VAT Number Address Website Date Time Upload Files Extra Field 1 Extra Field 2 Extra Field 3 Select the form fields to enable it in the frontend

Select fields to show in dealer inquiry form.

Allowed Upload File Types [store view] jpeg,png Add the file types to be allowed to attach with the form

Add comma separated file extensions to allow file upload from the form(for e.g. jpeg,jpg,png).

- **Custom Form Labels**
Configure the form labels for all the form fields as shown here:

Custom Form Labels

Enter customized label text for various form fields here

First Name <small>[store view]</small>	First Name
Last Name <small>[store view]</small>	Last Name
Company Name <small>[store view]</small>	Company Name
Tax/VAT Number <small>[store view]</small>	Tax/VAT Number
Street Address <small>[store view]</small>	Street Address
City <small>[store view]</small>	City
State <small>[store view]</small>	State
Country <small>[store view]</small>	Country
Zip/Postal Code <small>[store view]</small>	Zip/Postal Code
Contact Number <small>[store view]</small>	Contact Number
Email <small>[store view]</small>	Email
Website <small>[store view]</small>	Website
Description <small>[store view]</small>	Description
Date Time <small>[store view]</small>	Date Time
Upload Files <small>[store view]</small>	Upload Files
Extra Field 1 <small>[store view]</small>	
Extra Field 2 <small>[store view]</small>	
Extra Field 3 <small>[store view]</small>	

4. New Dealer Inquiry Email Settings

Whenever a new dealer inquiry is submitted from the frontend, admin gets an Email based on the below settings.

- **Email Template:** Select the Email Template from the drop-down menu.
- **Email ID of Admin:** Input the Email ID of Admin.

New Dealer Inquiry Email Settings

Email Template <small>[store view]</small>	Dealer Inquiry-Admin Email(Default)	Select the Email Template from dropdown menu
Email ID of Admin <small>[store view]</small>		Input the Email ID of Admin

5. Dealer Inquiry Successful Submission Email Settings

Refer the settings below for dealer inquiry successful submission Email to the customers.

- **Email Sender:** Select the Email Sender from the dropdown.
- **Email Template:** Select the Email Template for successful submission Email.

Dealer Inquiry Successful Submission Email Settings

Email Sender <small>[store view]</small>	General Contact	Select the Email Sender from the dropdown
Email Template <small>[store view]</small>	Dealer Inquiry-Customer Submit Form Email(F	Select the Email Template for successful submission Email

6. New Dealer Account Registration Email Settings

Configure the new dealer account registration Email settings to send credentials to the newly created dealer accounts.

New Dealer Account Registration Email Settings

Email Sender <small>[store view]</small>	Sales Representative	Select the Email Sender from dropdown
Email Template <small>[store view]</small>	Dealer Inquiry-Create Customer Email(Default)	Select the Email Template for registration Email

7. GDPR Compliance Notice Settings

The module is compatible with EU's GDPR after the following settings are configured:

- **GDPR Compliance Notice in Form:** Enable the GDP Compliance Notice in the form.
- **Notice Text:** Add the custom text for GDPR Compliance notice.

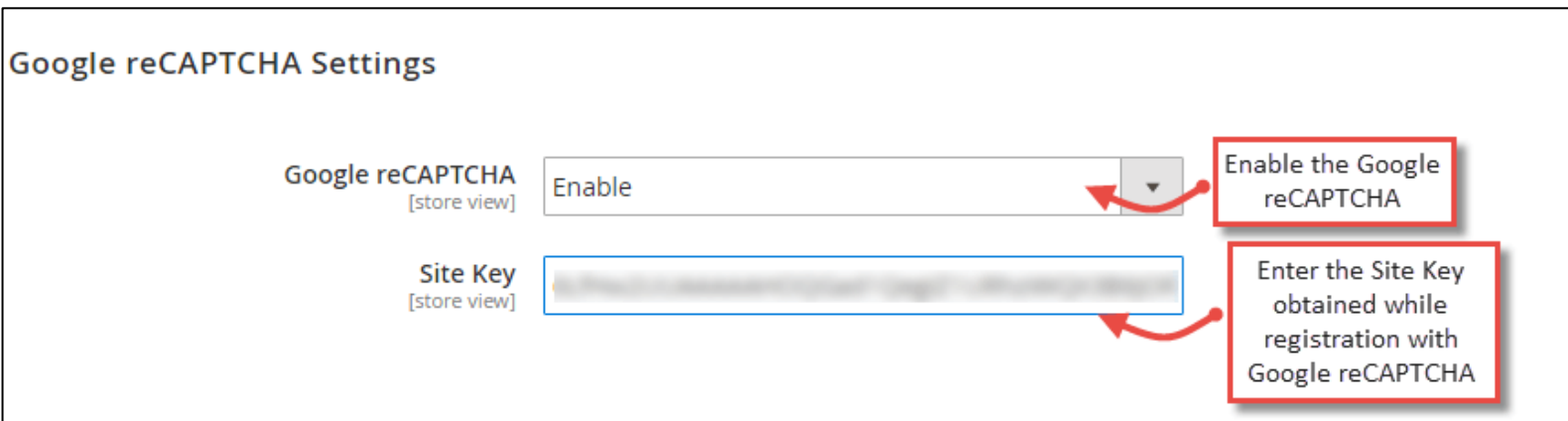
GDPR Compliance Notice Settings

GDPR Compliance Notice in Form <small>[store view]</small>	Enable	Enable the GDPR Compliance Notice in the form
Notice Text <small>[store view]</small>	All information received by us from your registration will be used in accordance with our Privacy Policy.	Add the custom text for GDPR Compliance notice

8. Google reCAPTCHA Settings

Enable Google reCAPTCHA in the dealer inquiry form to avoid spam inquiries.

- **Google reCAPTCHA:** Enable the Google reCAPTCHA.
- **Site Key:** Enter the site key obtained while registration with [Google reCAPTCHA](#).



Google reCAPTCHA Settings

Google reCAPTCHA [store view] Enable

Site Key [store view]

Enable the Google reCAPTCHA

Enter the Site Key obtained while registration with Google reCAPTCHA

9. Dealer Inquiry in Frontend


Once the settings are configured properly, the Admin and Customer gets Emails for notification of new dealer inquiry and successful form submission.

- **Dealer Inquiry Form in Frontend**
The dealer inquiry form is displayed with Google reCAPTCHA enabled as shown here. Also, the URL key is displayed as set from the backend. The user can submit the form with Submit button.

Dealer Inquiry x

meetanshi.in/demo4/become-a-dealer Page URL of inquiry form

Welcome, John Doe! John Doe v

 LUMA

Dealer Inquiry

Dealer Inquiry

Submit the form to apply for a new dealership account

First Name *

Last Name *

Email *

Company Name *

Tax/VAT Number

Street Address *

City *

Zip/Postal Code *

State *

Country *


Contact Number *

Website

Description *

Date Time

Upload Files
 bag.png

I'm not a robot  **Google reCAPTCHA enabled in the form**


All information received by us from your registration will be used in accordance with our Privacy Policy.

Click to submit the form

- **Email to Admin on New Dealer Inquiry**

The image shows the Email received by the admin when a new dealer inquiry form is submitted to notify admin for the same.

New Dealer Inquiry Received Inbox x Print Image


 **John Doe** via meetanshi.in
to me

Email received by the admin when a new dealer inquiry is received 3:56 PM (5 minutes ago) Star Reply Dropdown

Hello Admin,

You have received a new dealer inquiry with below details.


First Name: John
Last Name: Doe
Email: meetanshi.pr@gmail.com
Company Name: Johnny's Bags
Address: 40445, Graystone Lakes
City: San Francisco
Zip/Postal Code: 94016
Country: United States
State/Province: California
Contact Number: 0123456789
Website: johnbags.com
Business Description: I am interested in registration for dealer account for fusion bags.
Date & Time: 30-07-2018 15:52
Uploaded Files: bag.png



- **Email to Customers on Successful Inquiry Submission**

The image shows the Email sent to customers to notify them about the successful inquiry submission.

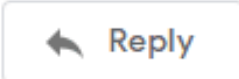
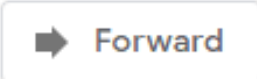
Dealer Inquiry Submission Successful Inbox x

 **Owner** support@example.com via meetanshi.in
to me ▾

Hello John Doe ,

Thank you for your dealer inquiry at Main Website Store. We will process it and contact back soon.

Looking forward to doing business with you!

Email received by the dealer account applicant on successful form submission

10. Manage Dealer Inquiries in Backend

The module supports a backend grid from where the admin can manage new dealer inquiries. The grid is updated on a new dealer inquiry form submission and the admin can view its details and create a customer from here as shown in the figure.

Manage Dealer Inquiries

Backend Grid to manage the Dealer Inquiries

Search by keyword

Filters Default View Columns

Actions 3 records found 20 per page 1 of 1

Dealer ID	First Name	Last Name	Email ID	Is Customer Created	Store View	Action
4	Hardik	hirani		NOT CREATED	Main Website Main Website Store	Select
5	John	Doe		CREATED	Main Website Main Website Store Meetanshi	View Dealer
6	John	Doe		NOT CREATED	Main Website Main Website Store Meetanshi	Select

View Inquiry or create customer

Click to view the dealer's details

If you have any question or need support, Contact us at <https://meetanshi.com/contacts/>