

# Quote Communication

## Overview

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In this section, you will find information about the process to communicate the quote, in particular:

- How to generate a PDF in tabular or detailed format
- How to attach files
- How to manage versions (versioning)
- How to send the quote PDF to the customer contact

### Concerned profiles:

ALL

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## Step By Step

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| PDF generation                           |                             |
|--|-----------------------------|
| Open the quote and click on Generate PDF | <a href="#">blocked URL</a> |

## Common header for all PDF format

|   |   |   |  |
|---|---|---|--|
|  | Solvay (Beijing) Energy Technology Co Ltd<br>Fenghuang Town<br>215613 Zhangjiagang<br>CHINA | Account Manager<br>Julien Andreoli<br>julien.andreoli-ext=solvay.co | Title is now « Account Manager » instead of Salesrep<br><br>Release R6     |
|   |   | Account RCS/PRIS ID is now displayed on the PDF.<br><br>Release R6  |  |
| <b>Account</b>  | BAYER CROPSCIENCE LTD C/O<br>EUROSERVICES BAYER S.L. - 123456                               | <b>Ship to</b>  | BAYER CROP SCIENCE LP CSF KANSAS<br>CITY BAYER                             |
| <b>Address</b>  | .<br>BARCELONA<br>BARCELONA 8080<br>Spain   | <b>Delivery address</b>   | 8400 HAWTHORNE RD ,<br>KANSAS CITY<br>MISSOURI 64120-2301<br>United States |
| <b>Primary Contact</b>  | BA-WOOL CHANG   | <b>Incoterm@2010</b>  | DAT - barcelona  |
| <b>Expiration date</b>  | 11/30/2016  | <b>Specific Requirements</b>  | My specific requirements :....   |
| <b>Price Validity</b>   | 8/22/2016 -- 12/31/2016   | <b>Customer Service Representative</b>                              | Anne Gilles<br>+ 33 4 37 24 89 10<br>anne.gilles=solvay.com@example.com    |
| <b>Volume validity</b>  | 8/22/2016 -- 12/31/2016   |   |  |
| <b>Payment terms</b>  | 30 days   |   |  |
| <b>Invoice periodicity</b>  | Monthly invoicing   |   |  |
| <b>Price per quarter</b>  | no price per quarter  |   |  |
| <b>Extra Charges</b>  | 1000.00 (EUR) my specific extra charges info  |   |  |

## Tabular format

| Product                       | Price per UoM      | Volume                 | Packaging | Incoterm@2010   |
|-------------------------------|--------------------|------------------------|-----------|-----------------|
| BICARBONATE BASED DERIVATIVES | 1000.00 (EUR) / Kg | 2000.00 - 2000.00 (Kg) |           | DAT - barcelona |

## Detailed format

|                                       |                              |
|---------------------------------------|------------------------------|
| <b>Price per UoM</b>                  | 1000.00 (EUR) / Kg           |
| <b>Volume</b>                         | 2,000.00 to 2,000.00 (Kg)    |
| <b>Concentration</b>                  | 36.00%                       |
| <b>Rebate</b>                         | 10.00% My rebate info        |
| <b>Specific discount</b>              | 5.00% My specific discount i |
| <b>Minimum order quantity</b>         | 1,000.00 / Kg                |
| <b>Freight cost</b>                   | 120.00 (EUR) my freight cos  |
| <b>Comments / Shipping Conditions</b> | to be delivered before 9 AM  |

## Other format : Tabular Landscape

| Country       | Ship to  | Product                          | Volume                      | Packaging | Incoterm@2010   | Price per UoM         | Payment terms | Lead time | Shipping plant                   | Manufacturing plant              | Comments / Shipping Conditions |
|---------------|--|----------------------------------|-----------------------------|-----------|-----------------|-----------------------|---------------|-----------|----------------------------------|----------------------------------|--------------------------------|
| United States | BAYER CROP SCIENCE LP CSF<br>KANSAS CITY BAYER | BICARBONATE BASED<br>DERIVATIVES | 2,000.00 -<br>2,000.00 (Kg) | BAG       | DAT - barcelona | 1000.00<br>(EUR) / Kg | 30 Days       | 20 days   | SCHM-US<br>/KANORADO B.<br>ROUGE | SCHM-US<br>/KANORADO B.<br>ROUGE | to be delivered<br>before 9 AM |

Note that if a column is empty, it will not be displayed.

## Quote PDF Document - Language

The PDF template is available in several languages. The language will be defaulted to the Primary Contact's language selected in the Quote.

The available languages are the following: Bulgarian, Chinese simplified, Chinese traditional, Dutch, English, Finnish, French, German, Italian, Japanese, Korean, Polish,

## Quote PDF Document - Terms & Condition

When you will generate the PDF, the terms and conditions will be attached.

The terms and conditions attached are related to the region of the account and language selected for the template.

### Conditions available languages for each region:

| Region | Condition available languages  |
|--------|--|
| APAC   | Chinese / Korean / Japanese / English  |
| EMEA   | French / Italian / Spanish / German / Dutch / Bulgarian / Czech / English / Hungarian / Polish / Portuguese / Romanian |
| NAM    | English  |
| LAM    | Portuguese / Spanish / English   |

As you can see, there are no translation in all languages for every regional condition.

If the contact language is not in this list for his region, then the General Terms and Conditions will be displayed in **English**.

For example, if the chosen region is NAM and the chosen language is French, then the PDF will be in French and the condition in English.

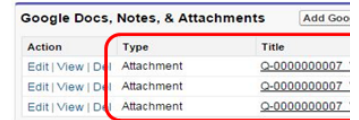
## Quote PDF Document

On the top of the page, you can choose

You can:

1. Save the PDF as attachment

By clicking on this button, the document related list.



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| Edit   View   D... | Attachment | Q-0000000007 |
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2. Save and Send
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## File attachments

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## Attachments

Attach File

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| Bilingual_2016-01-11_1131_part2of2.zip | gafia  | 841KB | <input type="checkbox"/> |
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The limitation of the combined files attachment is 3 MB

## Manage Versioning

When the user saves the pdf as attachment, the system will save it with a new version name.

| Action   | Type       | Title               | Last Modified    | Created By                     |
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| <a href="#">Edit</a>   <a href="#">View</a>   <a href="#">Delete</a> | Attachment | Q-0000000007_V3.pdf | 24/12/2015 19:03 | <a href="#">Geoffray Atian</a> |
| <a href="#">Edit</a>   <a href="#">View</a>   <a href="#">Delete</a> | Attachment | Q-0000000007_V2.pdf | 24/12/2015 19:02 | <a href="#">Geoffray Atian</a> |
| <a href="#">Edit</a>   <a href="#">View</a>   <a href="#">Delete</a> | Attachment | Q-0000000007_V1.pdf | 24/12/2015 19:02 | <a href="#">Geoffray Atian</a> |

You will find on this related list information such as the title of the document and when it has been created.

Quote PDF Document - Sending In

Task **Send an Email** Help for this Page

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**Edit Email** Required Information

Email Format: **Text-Only** ([Switch to HTML](#))

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Related To:

Additional To:

CC:

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Subject:

Body:

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**Attachments**

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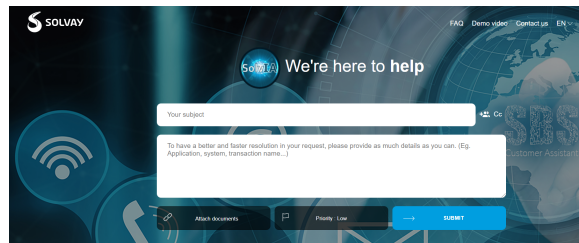
[Back to the top](#)

## Need help?

## Related articles

- [Quote Creation](#)
- [Quote Creation from a Growth Business Opportunity.](#)
- [Quote Mass Clone](#)
- [Quote Mass Update](#)
- [Quote Manual Sharing](#)
- [Quote Approval Process](#)
- [Quote Email Template creation](#)
- [Customer validation and Follow up](#)
- [Create a New Opportunity](#)
- [Clone an Existing Opportunity](#)
- [Definitions, Types of Opportunities & Process](#)

To request any support or if you have identified a bug or incident , please create a Freshdesk ticket using Solvia platform : <https://solvia.solvay.com/>



*you can copy users with email address , default priority is Low , then Submit . We advise you to put keywords in subject to ease dispatching to correct Agent : CRM - Complaint for example*