Quote Creation

Overview

In this section, you will find information about the process to create a quote from a recurrent business opportunity and from a growth business opportunity, including:

- How to actually create a quote in Salesforce
- What information is copied and prefilled in the quote
- What information is needed to save the quote
- How to add product information

Concerned profiles:

ALL

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    - Information copied and prefilled in the quote
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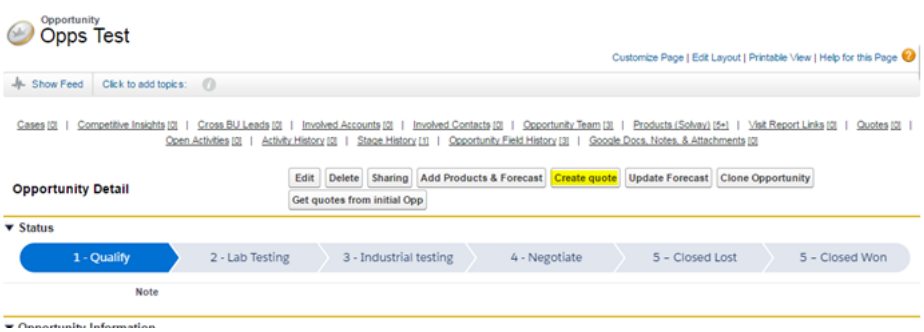
Step By Step

How to create a quote from a Growth business opportunity

Once the salesrep has created a growth business opportunity and needs to send a quote to the customer, he will click the “create quote” button in the opportunity page.	

Information copied and prefilled in the quote

Then the user will arrive on the quote edit page with some prefilled information. All prefilled information are listed below.

Fields	Value coming from	Value
Opportunity	Opportunity name	*Depending on the opportunity*
Visibility	Opportunity visibility	*Depending on the opportunity*
GBU	Opportunity GBU	*Depending on the opportunity*
BU	Opportunity BU	*Depending on the opportunity*
Status	Defaulted value	*Draft*
Currency	Opportunity currency	*Depending on the opportunity*
Template	Defaulted value	*Detailed*
Template language	Contact's language	*Depending on the contact*
Account	Opportunity's account	*Depending on the opportunity*
Primary contact	Opportunity contact	*Depending on the opportunity*
Invoice periodicity	Defaulted value	*Monthly invoicing*

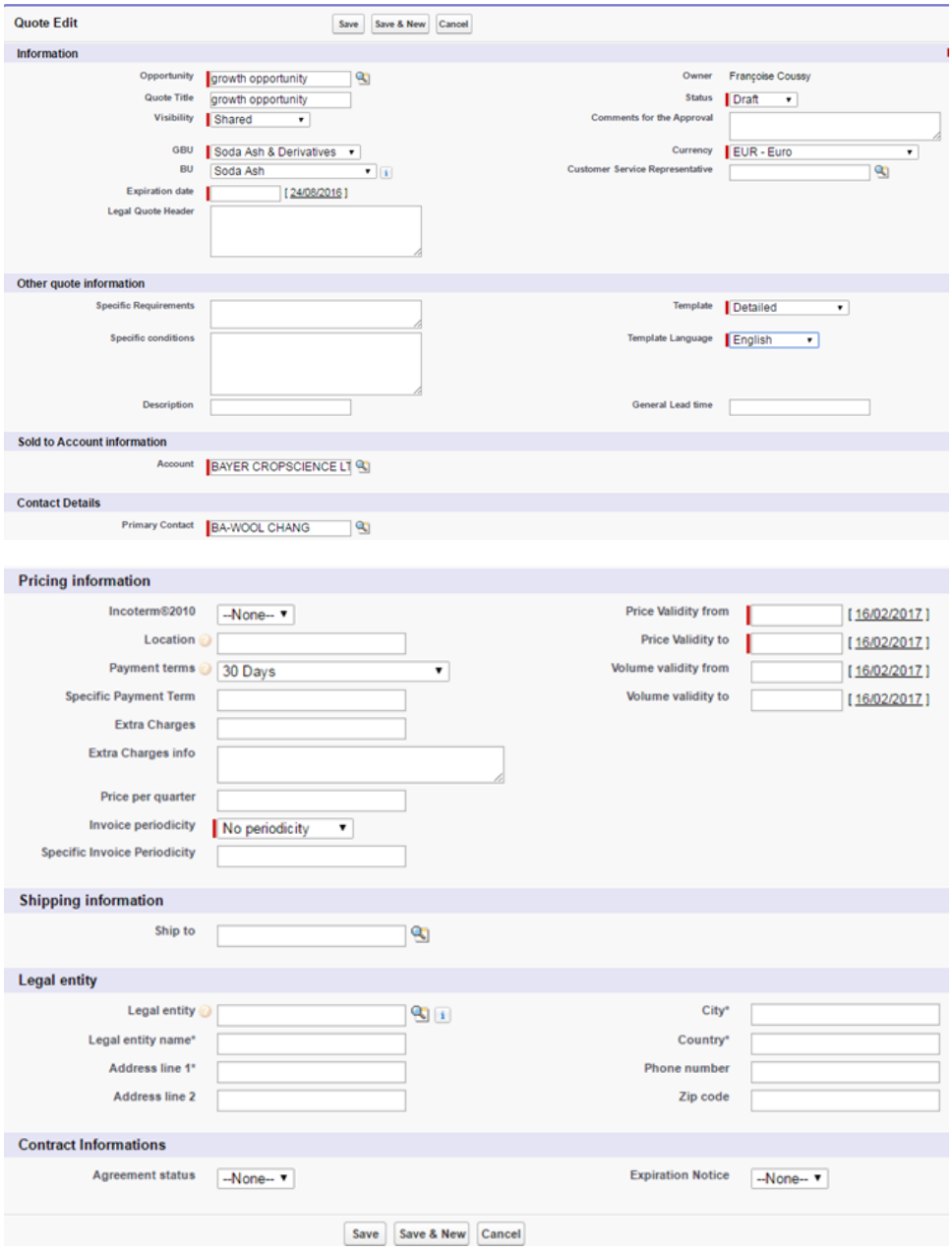
Other information needed to save the quote

Some other information not prefilled are mandatory to save the quote:

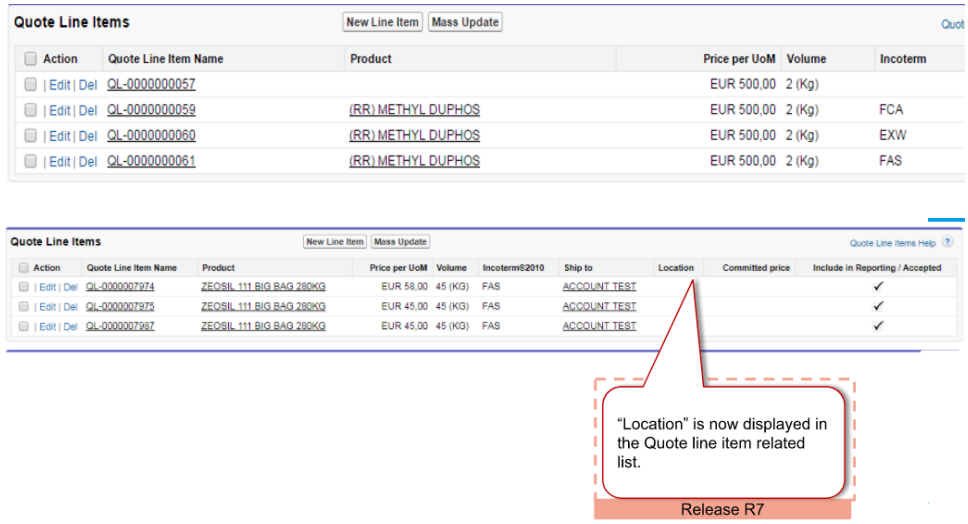
Field	Field type
Price validity from	Date
Price validity to	Date
Expiration date	Date

Optional Quote Information

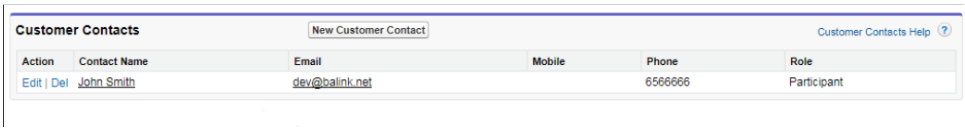
The user fills all the information in the quote header



Then the user clicks on **Save** and quote is saved with related quote line items.



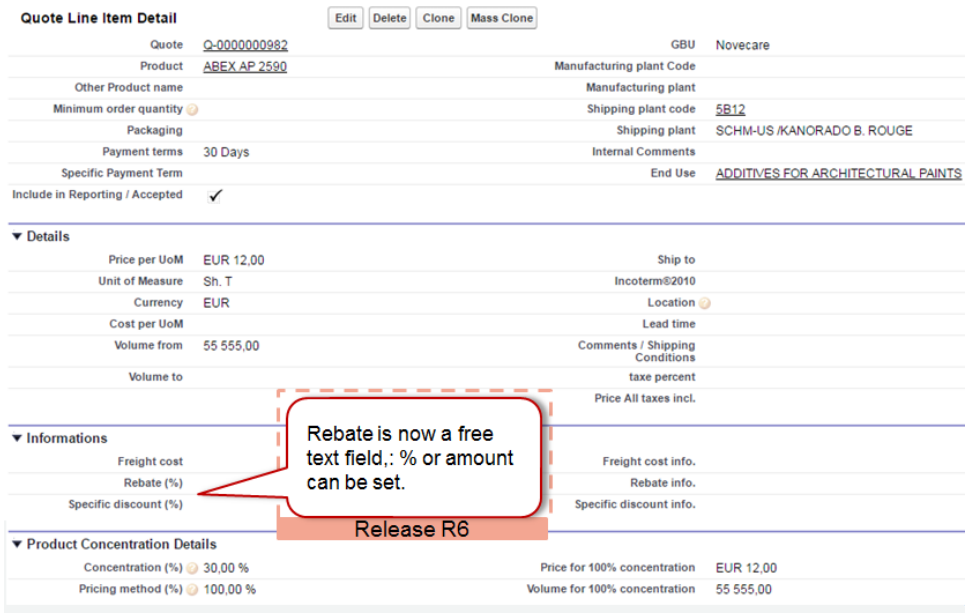
It is now possible to link several contacts to a quote with the "Customer Contacts" related list. When a quote is cloned the customer contacts will also be cloned.

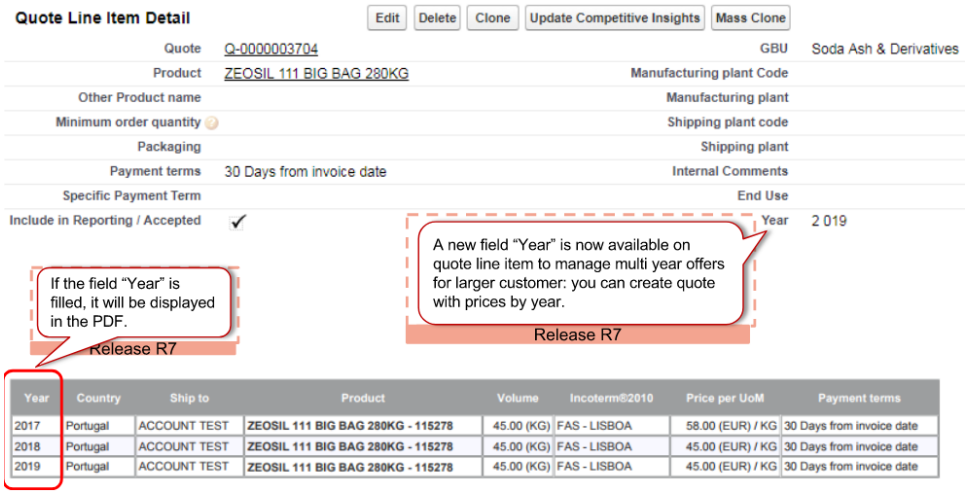


Product information

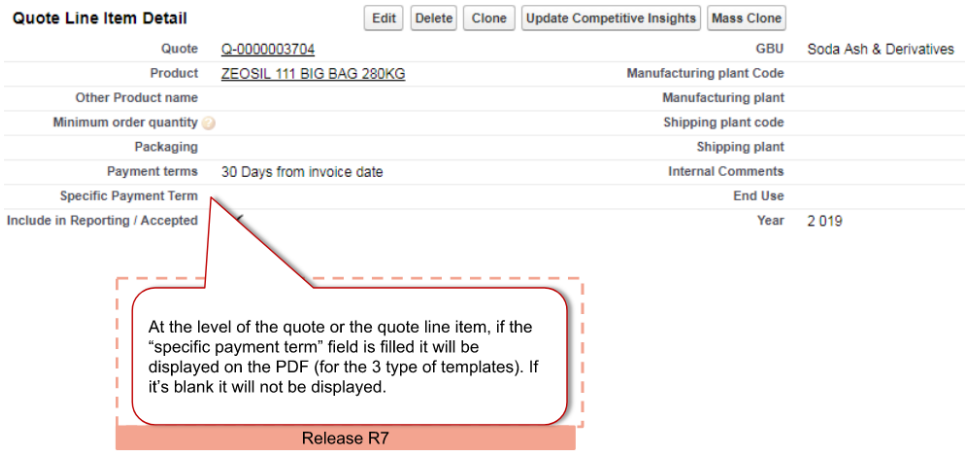
All product related information is handled in the quote line items. The information of the quote line items are prefilled with available data in the product information section of the opportunity.

In the quote line item the information that can be handled are the following



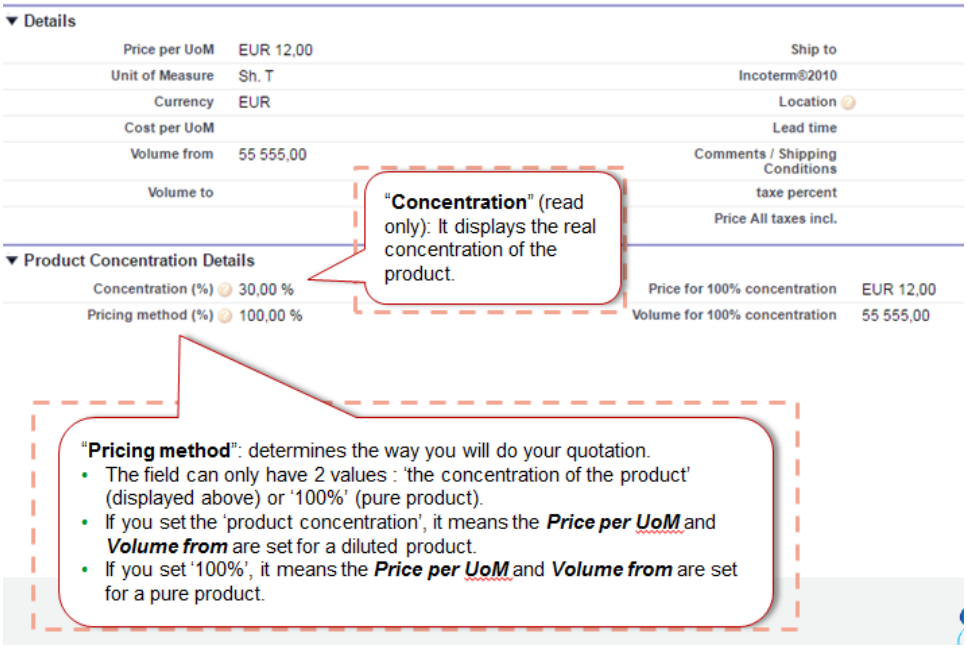


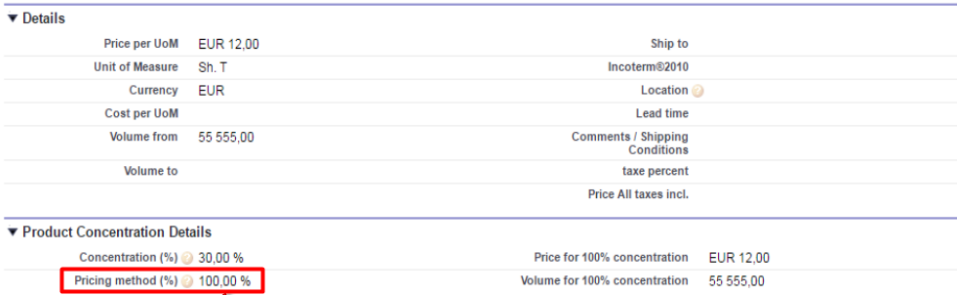
Year	Country	Ship to	Product	Volume	Incoterm®2010	Price per UoM	Payment terms
2017	Portugal	ACCOUNT TEST	**ZEOSIL 111 BIG BAG 280KG - 115278**	45.00 (KG)	FAS - LISBOA	58.00 (EUR) / KG	30 Days from invoice date
2018	Portugal	ACCOUNT TEST	**ZEOSIL 111 BIG BAG 280KG - 115278**	45.00 (KG)	FAS - LISBOA	45.00 (EUR) / KG	30 Days from invoice date
2019	Portugal	ACCOUNT TEST	**ZEOSIL 111 BIG BAG 280KG - 115278**	45.00 (KG)	FAS - LISBOA	45.00 (EUR) / KG	30 Days from invoice date



The user fills the price and the volume for each product included in the quote.

Let's have a closed look to pure /diluted quotation process:

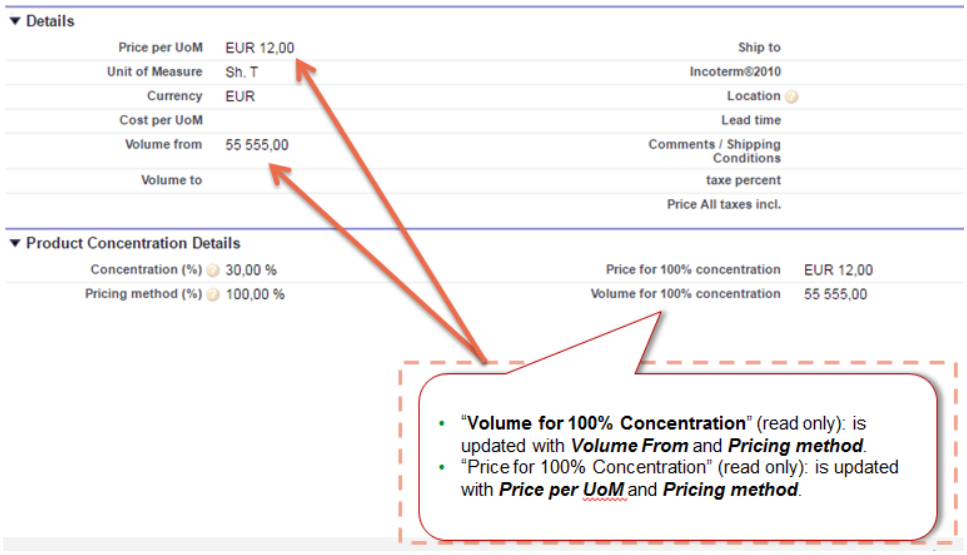




For the GBUs **Soda Ash** and **Peroxides** unless the user sets manually "100%" during quote line item creation, the pricing method will be set automatically with the value of the product concentration.

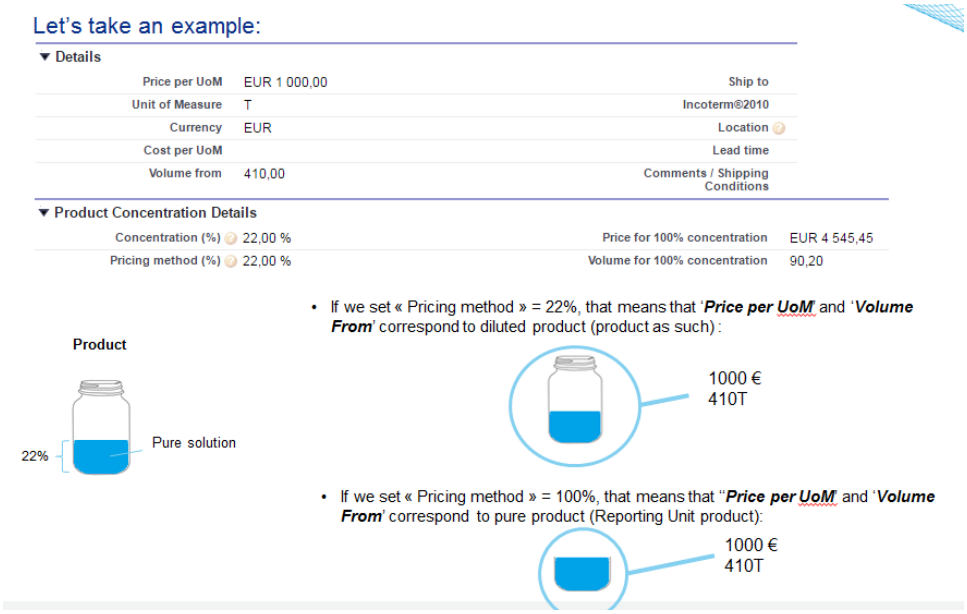
The user fills the price and the volume for each product included in the quote.

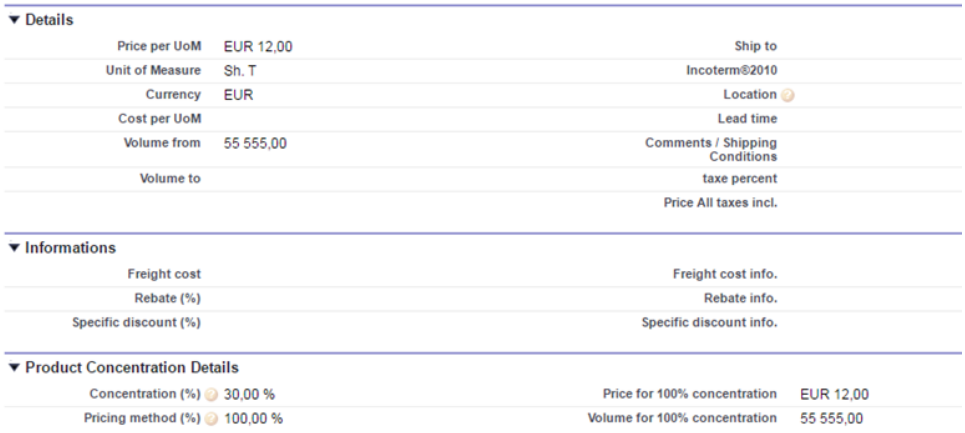
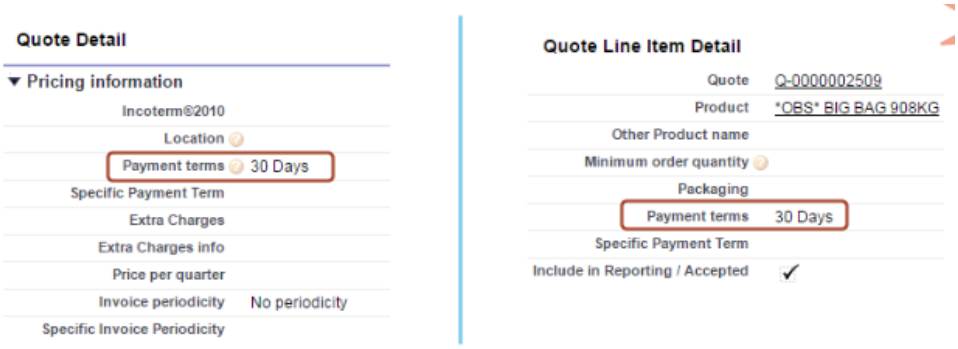
Let's have a closed look to pure /diluted quotation process:



The user has a growth business opportunity on an existing product and his customer has asked him to send him a commercial offer to finalize the negotiation. The user prepares his quote.

Let's take an example:



The user fills the prices and the volume for each product included in the quote. The user updates price and volume and click on save. The quote is ready.	
Payment terms automation: Payment terms can be managed at the quote header OR at the quote line item level.	 • If a payment term is set at the quote header level, payment terms of the line items will be set this value. • If a payment term is set on the header, and the user set a different payment term on a line item, the header payment term will be set to 'no value'. • If a user update the header payment value from 'no value' to a value, all line items payment terms will be updated to this value, even if they had a another value.

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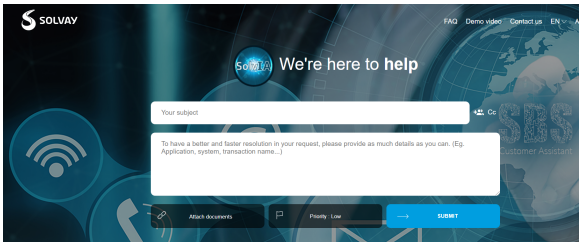
Related articles

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

Need help?

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/



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