

04. Quotation

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From Prospect to Sales



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Added Value

Quotes are an extremely **important part of the sales cycle**. Not only are quotes the blueprint for the contract, but they are often the **first impression we leave on our customer**.

Quotes give us an opportunity to make a **strong brand impression**, and **demonstrate our commitment** to the customer. Quotes can move our deals forward by:

- Making a positive first impression (accurate and professional document within their time frame)!
- Giving you the first mover advantage (whoever delivers the quote first often gains the advantage in the negotiation process);
- Setting the starting point for negotiation;
- Getting the customer to commit.

We can implement metrics, such as:

- Average Quote Value
- Percent of Opportunities Quoted
- Discount Performance Trend

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What you need to know to start...

A quote should be created from an opportunity. There are different scenarios that lead to the creation of a quote, illustrated below:

1. To manage recurrent business, GBU can create quote directly from an account by clicking in "New quote"
2. We can create a quote from a growth business opportunity by click the "create quote" button in the opportunity page.



Quote security settings : Shared

	Quote owner+ backup+ hierarchy	GBU data steward	Opportunity Team Member with Read access	Opportunity Team Member with Read/Write access	CSR	All <u>others</u> users
View a Quote	√	√	√	√	√	√
Create a Quote	√	√	×	√	×	×
Submit an approval for a Quote	√	√	×	×	×	×
Edit a Quote	√	√	×	×	×	×
Share a Quote	√*(not possible for the backup)	√	×	×	×	×
Delete a Quote	√*(not possible for the backup) only possible for Draft status	√	×	×	×	×
Send a Quote	√	√	×	×	×	×

The permissions here are technical permissions and are not related to functional roles. For example, the GBU data steward, will not create quotes even if in the system it is technically possible.

Quote security settings : GBU restricted

	Quote owner+ backup+ hierarchy	GBU data steward	Opportunity Team Member with Read access	Opportunity Team Member with Read/Write access	CSR	All others users of the GBU	All others users of others GBU
View a Quote	√	√	√	√	√	√	×
Create a Quote	√	√	×	√	×	×	×
Submit an approval for a Quote	√	√	×	×	×	×	×
Edit a Quote	√	√	×	×	×	×	×
Share a Quote	√*(not possible for the backup)	√	×	×	×	×	×
Delete a Quote	√*(not possible for the backup) only possible for Draft status	√	×	×	×	×	×
Send a Quote	√	√	×	×	×	×	×

Quote security settings confidential

	Quote owner+ backup+ hierarchy	GBU data steward	Opportunity Team Member with Read access	Opportunity Team Member with Read/Write access	CSR
View a Quote	✓	✓	✗	✗	✓
Create a Quote	✓	✓	✗	✓	✗
Submit an approval for a Quote	✓	✓	✗	✗	✗
Edit a Quote	✓	✓	✗	✗	✗
Share a Quote	✓*(not possible for the backup)	✓	✗	✗	✗
Delete a Quote	✓*(not possible for the backup) only possible for Draft status	✓	✗	✗	✗
Send a Quote	✓	✓	✗	✗	✗

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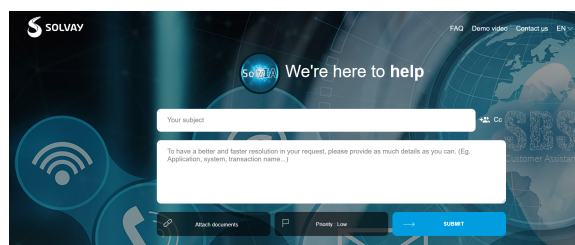


For more info

- [Transactional Pricing \(Commitments\)](#)

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