

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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Step By Step

How to create a quote from a Growth business opportunity

Once the sales rep 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.

The screenshot shows the Salesforce interface for an Opportunity record titled "Opps Test". At the top, there are navigation links: "Customize Page | Edit Layout | Printable View | Help for this Page". Below this is a "Show Feed" button and a "Click to add topics" link. A breadcrumb trail includes: "Cases", "Competitive Insights", "Cross BU Leads", "Involved Accounts", "Involved Contacts", "Opportunity Team", "Products (Solvay)", "Visit Report Links", "Quotes", "Open Activities", "Activity History", "Stage History", "Opportunity Field History", and "Google Docs, Notes, & Attachments". The "Opportunity Detail" section contains buttons for "Edit", "Delete", "Sharing", "Add Products & Forecast", "Create quote" (highlighted in yellow), "Update Forecast", and "Clone Opportunity". Below the buttons is a "Get quotes from initial Opp" link. The "Status" section shows a progress bar with five stages: "1 - Quality" (active), "2 - Lab Testing", "3 - Industrial testing", "4 - Negotiate", "5 - Closed Lost", and "5 - Closed Won". A "Note" section is visible below the status bar.

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	<i>Depending on the opportunity</i>
Visibility	Opportunity visibility	<i>Depending on the opportunity</i>
GBU	Opportunity GBU	<i>Depending on the opportunity</i>
BU	Opportunity BU	<i>Depending on the opportunity</i>
Status	Defaulted value	<i>Draft</i>
Currency	Opportunity currency	<i>Depending on the opportunity</i>
Template	Defaulted value	<i>Detailed</i>
Template language	Contact's language	<i>Depending on the contact</i>
Account	Opportunity's account	<i>Depending on the opportunity</i>
Primary contact	Opportunity contact	<i>Depending on the opportunity</i>
Invoice periodicity	Defaulted value	<i>Monthly invoicing</i>

Other information needed to save the quote

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

Field	Field type
Price <u>validity from</u>	Date
Price <u>validity to</u>	Date
Expiration date	Date

Optional Quote Information

The user fills all the information in the quote header

Quote Edit Save Save & New Cancel

Information

Opportunity: growth opportunity
 Quote Title: growth opportunity
 Visibility: Shared
 GBU: Soda Ash & Derivatives
 BU: Soda Ash
 Expiration date: 24/08/2016
 Legal Quote Header:

Owner: Françoise Cousy
 Status: Draft
 Comments for the Approval:
 Currency: EUR - Euro
 Customer Service Representative:

Other quote information

Specific Requirements:
 Specific conditions:
 Description:
 Template: Detailed
 Template Language: English
 General Lead time:

Sold to Account information

Account: BAYER CROPSCIENCE LT

Contact Details

Primary Contact: BA-WOOL CHANG

Pricing information

Incoterm@2010: --None--
 Location:
 Payment terms: 30 Days
 Specific Payment Term:
 Extra Charges:
 Extra Charges info:
 Price per quarter:
 Invoice periodicity: No periodicity
 Specific Invoice Periodicity:

Price Validity from: 16/02/2017
 Price Validity to: 16/02/2017
 Volume validity from: 16/02/2017
 Volume validity to: 16/02/2017

Shipping information

Ship to:

Legal entity

Legal entity:
 Legal entity name*:
 Address line 1*:
 Address line 2:
 City*:
 Country*:
 Phone number:
 Zip code:

Contract Informations

Agreement status: --None--
 Expiration Notice: --None--

Save Save & New Cancel

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

Quote Line Items New Line Item Mass Update Quote

Action	Quote Line Item Name	Product	Price per UoM	Volume	Incoterm
<input type="checkbox"/> Edit Del	QL-0000000057	(RR) METHYL DUPHOS	EUR 500,00	2 (Kg)	FCA
<input type="checkbox"/> Edit Del	QL-0000000059	(RR) METHYL DUPHOS	EUR 500,00	2 (Kg)	EXW
<input type="checkbox"/> Edit Del	QL-0000000060	(RR) METHYL DUPHOS	EUR 500,00	2 (Kg)	FAS

Quote Line Items New Line Item Mass Update Quote Line Items Help

Action	Quote Line Item Name	Product	Price per UoM	Volume	Incoterm@2010	Ship to	Location	Committed price	Include in Reporting / Accepted
<input type="checkbox"/> Edit Del	QL-0000007974	ZEOSIL_111 BIG BAG 280KG	EUR 58,00	45 (KG)	FAS	ACCOUNT_TEST			✓
<input type="checkbox"/> Edit Del	QL-0000007973	ZEOSIL_111 BIG BAG 280KG	EUR 45,00	45 (KG)	FAS	ACCOUNT_TEST			✓
<input type="checkbox"/> Edit Del	QL-0000007997	ZEOSIL_111 BIG BAG 280KG	EUR 45,00	45 (KG)	FAS	ACCOUNT_TEST			✓

"Location" is now displayed in the Quote line item related list.

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.

Customer Contacts		New Customer Contact	Customer Contacts Help ?		
Action	Contact Name	Email	Mobile	Phone	Role
Edit Del	John Smith	dev@balink.net		6566666	Participant

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

Quote Line Item Detail

[Edit](#) [Delete](#) [Clone](#) [Mass Clone](#)

Quote	Q-000000982	GBU	Novicare
Product	ABEX AP 2500	Manufacturing plant Code	
Other Product name		Manufacturing plant	
Minimum order quantity		Shipping plant code	5B12
Packaging		Shipping plant	SCHM-US /KANORADO B. ROUGE
Payment terms	30 Days	Internal Comments	
Specific Payment Term		End Use	ADDITIVES FOR ARCHITECTURAL PAINTS
Include in Reporting / Accepted	<input checked="" type="checkbox"/>		

▼ **Details**

Price per UoM	EUR 12,00	Ship to	
Unit of Measure	Sh. T	Incoterm@2010	
Currency	EUR	Location	
Cost per UoM		Lead time	
Volume from	55 555,00	Comments / Shipping Conditions	
Volume to		taxe percent	
		Price All taxes incl.	

▼ **Informations**

Freight cost		Freight cost info.	
Rebate (%)		Rebate info.	
Specific discount (%)		Specific discount info.	

Rebate is now a free text field, % or amount can be set.

Release R6

▼ **Product Concentration Details**

Concentration (%)	30,00 %	Price for 100% concentration	EUR 12,00
Pricing method (%)	100,00 %	Volume for 100% concentration	55 555,00

Quote Line Item Detail

[Edit](#) [Delete](#) [Clone](#) [Update Competitive Insights](#) [Mass Clone](#)

Quote	Q-0000003704	GBU	Soda Ash & Derivatives
Product	ZEOSIL 111 BIG BAG 280KG	Manufacturing plant Code	
Other Product name		Manufacturing plant	
Minimum order quantity		Shipping plant code	
Packaging		Shipping plant	
Payment terms	30 Days from invoice date	Internal Comments	
Specific Payment Term		End Use	
Include in Reporting / Accepted	<input checked="" type="checkbox"/>	Year	2 019

If the field "Year" is filled, it will be displayed in the PDF.

A new field "Year" is now available on quote line item to manage multi year offers for larger customer; you can create quote with prices by year.

Release R7

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

Quote Line Item Detail

[Edit](#) [Delete](#) [Clone](#) [Update Competitive Insights](#) [Mass Clone](#)

Quote	Q-0000003704	GBU	Soda Ash & Derivatives
Product	ZEOSIL 111 BIG BAG 280KG	Manufacturing plant Code	
Other Product name		Manufacturing plant	
Minimum order quantity		Shipping plant code	
Packaging		Shipping plant	
Payment terms	30 Days from invoice date	Internal Comments	
Specific Payment Term		End Use	
Include in Reporting / Accepted	<input checked="" type="checkbox"/>	Year	2 019

At the level of the quote or the quote line item, if the "specific payment term" field is filled it will be displayed on the PDF (for the 3 type of templates). If it's blank it will not be displayed.

Release R7

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 **So da 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.

▼ Details

Price per UoM	EUR 12,00	Ship to	
Unit of Measure	Sh. T	Incoterm®2010	
Currency	EUR	Location	
Cost per UoM		Lead time	
Volume from	55 555,00	Comments / Shipping Conditions	
Volume to		taxe percent	
		Price All taxes incl.	

▼ Product Concentration Details

Concentration (%)	30,00 %	Price for 100% concentration	EUR 12,00
Pricing method (%)	100,00 %	Volume for 100% concentration	55 555,00

"Concentration" (read only): It displays the real concentration of the product.

"Pricing method": determines the way you will do your quotation.

- The field can only have 2 values : 'the concentration of the product' (displayed above) or '100%' (pure product).
- If you set the 'product concentration', it means the **Price per UoM** and **Volume from** are set for a diluted product.
- If you set '100%', it means the **Price per UoM** and **Volume from** are set for a pure product.

▼ Details

Price per UoM	EUR 12,00	Ship to	
Unit of Measure	Sh. T	Incoterm®2010	
Currency	EUR	Location	
Cost per UoM		Lead time	
Volume from	55 555,00	Comments / Shipping Conditions	
Volume to		taxe percent	
		Price All taxes incl.	

▼ Product Concentration Details

Concentration (%)	30,00 %	Price for 100% concentration	EUR 12,00
Pricing method (%)	100,00 %	Volume for 100% concentration	55 555,00

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:

▼ Details

Price per UoM	EUR 12,00	Ship to	
Unit of Measure	Sh. T	Incoterm®2010	
Currency	EUR	Location	
Cost per UoM		Lead time	
Volume from	55 555,00	Comments / Shipping Conditions	
Volume to		taxe percent	
		Price All taxes incl.	

▼ Product Concentration Details

Concentration (%)	30,00 %	Price for 100% concentration	EUR 12,00
Pricing method (%)	100,00 %	Volume for 100% concentration	55 555,00

- "Volume for 100% Concentration" (read only): is updated with **Volume From** and **Pricing method**.
- "Price for 100% Concentration" (read only): is updated with **Price per UoM** and **Pricing method**.

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:

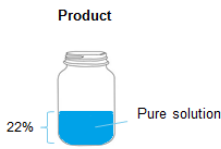
Let's take an example:

▼ Details


Price per UoM	EUR 1 000,00	Ship to	
Unit of Measure	T	Incoterm®2010	
Currency	EUR	Location	
Cost per UoM		Lead time	
Volume from	410,00	Comments / Shipping Conditions	

▼ Product Concentration Details


Concentration (%)	22,00 %	Price for 100% concentration	EUR 4 545,45
Pricing method (%)	22,00 %	Volume for 100% concentration	90,20



- If we set « Pricing method » = 22%, that means that '**Price per UoM**' and '**Volume From**' correspond to diluted product (product as such):



- If we set « Pricing method » = 100%, that means that '**Price per UoM**' and '**Volume From**' correspond to pure product (Reporting Unit product):



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.

▼ Details		
Price per UoM	EUR 12,00	Ship to
Unit of Measure	Sh. T	Incoterm®2010
Currency	EUR	Location
Cost per UoM		Lead time
Volume from	55 555,00	Comments / Shipping Conditions
Volume to		taxe percent
		Price All taxes incl.

▼ Informations		
Freight cost		Freight cost info.
Rebate (%)		Rebate info.
Specific discount (%)		Specific discount info.

▼ Product Concentration Details		
Concentration (%)	30,00 %	Price for 100% concentration
Pricing method (%)	100,00 %	Volume for 100% concentration
		EUR 12,00
		55 555,00

Payment terms automation:

Payment terms can be managed at the quote header OR at the quote line item level.

Quote Detail		Quote Line Item Detail	
▼ Pricing information		Quote <u>Q-0000002509</u>	
Incoterm®2010		Product	<u>*OBS* BIG BAG 908KG</u>
Location		Other Product name	
Payment terms 30 Days		Minimum order quantity	
Specific Payment Term		Packaging	
Extra Charges		Payment terms 30 Days	
Extra Charges info		Specific Payment Term	
Price per quarter		Include in Reporting / Accepted	<input checked="" type="checkbox"/>
Invoice periodicity	No periodicity		
Specific Invoice Periodicity			

- 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.

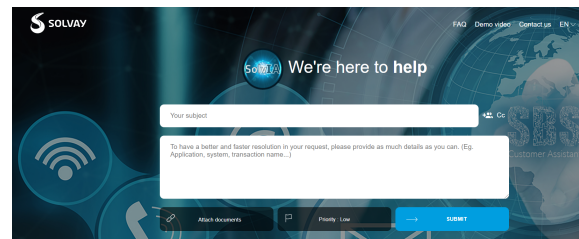
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Related articles

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- [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](#)
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- [Definitions, Types of Opportunities & Process](#)

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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