

## 2. Update commercial roadmap data

### Overview

In this section, you will find information about how to update commercial roadmap data, in particular:

- Complete A customers recurrent business
- Update B,C customers recurrent business
- Update growth business
- Run report to see your progress

### Concerned profiles:


Sales

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## Step By Step

### Update & Complete Commercial Roadmap



### Complete A customers data

For A customers the Commercial roadmap lines are empty for recurrent business. With the filter choose the A customers and complete all the lines and

**1** Filters allow you to reduce the numbers of ship to/product combinations: choose your filters and click on the button : apply filters

**2** Apply Filters

**3** You complete the current year + 5 years : Volume and Price Also Contribution margin for Novacare & EP

**4** Save

Recurrent business will show up in green

PY = Previous year  
ASP = Average Sales Price

Customer Classification	Product	GBU segmentation 2	Corporate Market
A	Product level 2	GBU segmentation 3	Corporate Segment
Country	Product level 3	Business Type	Corporate Group
Region	Ship to Name	Owner	Rodolfo Romero

Sales Average price PY	Sales volume PY Q1	Customer Classification	Ship To Name	City	Product	Product Code	Region	Corporate Group	Country	Group of activity	Sub activity	Plant Origin	ASP ex-work PY
EUR 605.00	148,700	A	JACOBE TONWERKE BILSHAUSEN	BILSHAUSEN	BARIUM CARBONATE POWDER	ALB0	EMEA	Germany	B.U. Other Non Core			Bear-De /Bad Hoern	EUR 582.00
Initial ASP year currencyY	Initial volume year in 1	Updated ASP year currencyY	Updated ASP ex work year currencyY	Updated volume year in 1	Updated ASP Q1 currencyY	Updated volume Q1 in 1	Updated ASP Q2 currencyY	Updated volume Q2 in 1	Updated ASP Q3 currencyY	Updated volume Q3 in 1	Updated ASP Q4 currencyY	Updated volume Q4 in 1	
				EUR 581.75	47.520	0.000							

Year	Initial ASP year currencyY	Initial volume year in 1	Updated ASP year currencyY
2016			
2017			
2018			
2019			
2020			
2021			

### For B&C customers analyze the pre-filled data with a report

For B&C customers the Commercial roadmap lines are pre-filled. Sales Rep will launch a report to analyze their data by revenue or by volume. If he want the product concerned.

**1** Click on Report button, Choose the folder : commercial Roadmap

**2** Click on Report name

Reports & Dashboards

Commercial Roadmap

Updated Volume & Price for A customer

Updated Volume & Price for B&C customer

Ship To Name	Account Name	Product	Product Name
		IS 51 METHYL	MUSCOE
		ABEX AP 236	
		AGRHO DCD	PROTECT
		AGRHO PR 2000	
		AGRHO PFC 1500	
		AGRHO NS	PROTECT
		AGRHO 18 DUAL	PROTECT
		AGRHO H	PROTECT

### Update data for B&C customers

Sales rep filters data and update the lines concerned. All data are stored (initial pre-filled and updates made).

**1** Update of pre-filled data

Filters

Header and Details

Sales Average price PY	Sales volume PY Q1	Customer Classification	Ship To Name	City	Product	Product Code	Region	Corporate Group	Country	Group of activity	Sub activity	Plant Origin	ASP ex-work PY
EUR 590.00	70,000	B	AGZ ZIEGEL EISEN AG HORV. GETTNAU	GETTNAU	BARIUM CARBONATE POWDER A	ALBB	EMEA	Switzerland	B.U. Other Non Core			Bear-De /Bad Hoern	EUR 551.18
Year	Initial ASP year currencyY	Initial volume year in 1	Updated ASP year currencyY	Updated ASP ex work year currencyY	Updated volume year in 1	Updated ASP Q1 currencyY	Updated volume Q1 in 1	Updated ASP Q2 currencyY	Updated volume Q2 in 1	Updated ASP Q3 currencyY	Updated volume Q3 in 1	Updated ASP Q4 currencyY	Updated volume Q4 in 1
2016			590	24,000	24	590	24	590	24	590	24	590	24
2017			600		100								
2018			601		110								
2019			610		112								
2020			615		115								

### Update Growth business



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## Synchronize Opportunities with the commercial roadmap

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Change in the Opportunity	Impacts on Commercial roadmap
<b>Opportunity status</b>	If the status is closed won the CR volume = Opportunity volume If the status is closed lost CR volume = 0
<b>% probability</b>	Volumes is recalculated in the CR
<b>Target first delivery date</b>	Volumes & Prices & CM are updated corresponding to the new date
<b>Delete a product</b>	CR is deleted
<b>Add a product</b>	A new line in the CR is created
<b>Change a product</b>	The product is update in the CR
<b>Change the business potential data</b>	Changes are replicated in the CR
<b>Change the end-use</b>	End use is changed in CR
<b>Create a new opportunity</b>	A new CR is created



Commercial Roadmap Opportunities Synchronization will be frozen based on the GBU specific timeline

## Recommendation

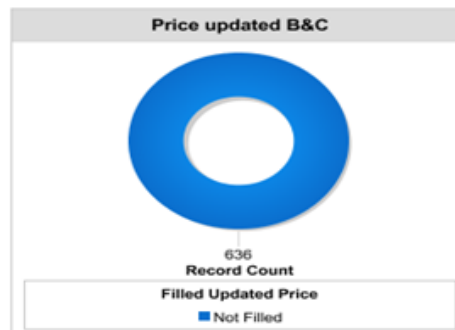
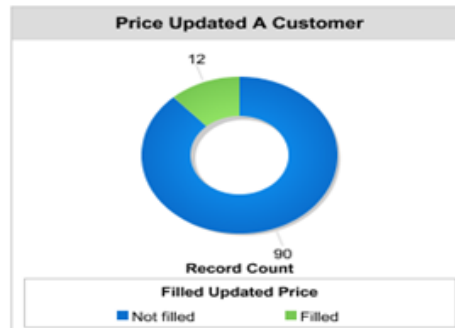
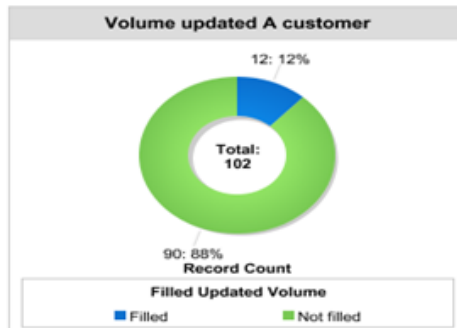
In terms of **Unit of Measure**, we strongly **recommend** to put all Opportunities in **tons, kg, kilopounds** or **pounds**, since Commercial Roadmap is based on tons or kilopounds. If other unit of measures are used in Opportunity, this cannot be converted to the Commercial Roadmap.

## Run Dashboard to see your progress

For **A customers** you follow the % of line filled

For **B&C customers** you follow the lines updated

Dashboard shows data of connected users (dynamic dashboard)



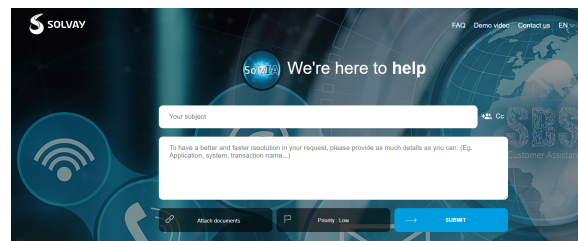
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## Related articles

- [Create a New Opportunity](#)
- [Introduction to Commercial Roadmap](#)
- [1a. Pre-fill Bottom-up exercise for Recurrent business](#)
- [1b. Pre-fill Bottom-up exercise for Growth business](#)
- [3. Adjust commercial roadmap data](#)
- [4. Compare bottom-up with Strategic Roadmap](#)
- [5. Freeze the Commercial Roadmap](#)

## 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/>



*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*