

P8. Quote Management

Presentation

Training Materials

Process Overview and Definition

Quotes are an extremely **important part of the sales cycle**. Not only are quotes the blueprint for the contract, but they also leave 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. They help us to 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)
- Setting the starting point for negotiation
- Getting the customer to commit

Note: there is no link with SAP; the CSR will have to manually create an order in SAP.



- A new customer asks for a Quote on an existing product -> **Growth business**
- A new customer asks for a product to be developed -> **Growth business**
- An existing customer asks for Product to be developed -> **Growth business**
- An existing customer asks for an existing product (Contract renewal) -> **Recurrent business**

- [Training presentation](#)
- [Tutorial videos](#)
- [New ONE Quote module - Novecare and TS](#)

Learn more by using the Interactive guides

Interactive Guides — [🔗](#)

- [Account Navigation](#)
- [Create Account](#)
- [Create Contact & Team Member](#)

Opportunity

- [Opportunity Navigation](#)
- [Create Opportunity](#)

Quote

- [Create Quote + Line Item & Generate PDF](#)

Visit Report

- [Create Visit Report + Add Contact & Team Member](#)

Cases

- [Create Complaint](#)
- [Create Sample](#)
- [Create Customer Request](#)
- [Create Customer Specific Requirement](#)

Lead

- [Lead Scoring & Navigation](#)