

Quote Communication

Overview

In this section, you will find information about the process to communicate the quote, in particular:

- How to generate a PDF in tabular or detailed format
- How to attach files
- How to manage versions (versioning)
- How to send the quote PDF to the customer contact

Concerned profiles:

ALL

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Step By Step

PDF generation	
Open the quote and click on Generate PDF	blocked URL

Common header for all PDF format

	Solvay (Beijing) Energy Technology Co Ltd Fenghuang Town 215613 Zhangjiagang CHINA	Account Manager Julien Andreoli julien.andreoli-ext=solvay.co
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Title is now « Account Manager » instead of Salesrep

Release R6

Account RCS/PRIS ID is now displayed on the PDF.

Release R6

Account	BAYER CROPSOURCE LTD C/O EUROSERVICES BAYER S.L. - 123456	Ship to	BAYER CROP SCIENCE LP CSF KANSAS CITY BAYER
Address	BARCELONA BARCELONA 8080 Spain	Delivery address	8400 HAWTHORNE RD , KANSAS CITY MISSOURI 64120-2301 United States
Primary Contact	BA-WOOL CHANG	Incoterm®2010	DAT - barcelona
Expiration date	11/30/2016	Specific Requirements	My specific requirements :....
Price Validity	8/22/2016 -- 12/31/2016	Customer Service Representative	Anne Gilles + 33 4 37 24 89 10 anne.gilles=solvay.com@example.com
Volume validity	8/22/2016 -- 12/31/2016		
Payment terms	30 days		
Invoice periodicity	Monthly invoicing		
Price per quarter	no price per quarter		
Extra Charges	1000.00 (EUR) my specific extra charges info		

Tabular format

Product	Price per UoM	Volume	Packaging	Incoterm®2010
BICARBONATE BASED DERIVATIVES	1000.00 (EUR) / Kg	2000.00 - 2000.00 (Kg)		DAT - barcelona

Detailed format

Price per UoM	1000.00 (EUR) / Kg
Volume	2,000.00 to 2,000.00 (Kg)
Concentration	36.00%
Rebate	10.00% My rebate info
Specific discount	5.00% My specific discount i
Minimum order quantity	1,000.00 / Kg
Freight cost	120.00 (EUR) my freight cos
Comments / Shipping Conditions	to be delivered before 9 AM

Other format : Tabular Landscape

Country	Ship to	Product	Volume	Packaging	Incoterm®2010	Price per UoM	Payment terms	Lead time	Shipping plant	Manufacturing plant	Comments / Shipping Conditions
United States	BAYER CROP SCIENCE LP CSF KANSAS CITY BAYER	BICARBONATE BASED DERIVATIVES	2,000.00 - 2,000.00 (Kg)	BAG	DAT - barcelona	1000.00 (EUR) / Kg	30 Days	20 days	SCHM-US /KANORADO B. ROUGE	SCHM-US /KANORADO B. ROUGE	to be delivered before 9 AM

Note that if a column is empty, it will not be displayed.

Quote PDF Document - Language

The PDF template is available in several languages. The language will be defaulted to the Primary Contact's language selected in the Quote.

The available languages are the following: Bulgarian, Chinese simplified, Chinese traditional, Dutch, English, Finnish, French, German, Italian, Japanese, Korean, Polish,

Quote PDF Document - Terms & Condition

When you will generate the PDF, the terms and conditions will be attached.

The terms and conditions attached are related to the region of the account and language selected for the template.

Conditions available languages for each region:

Region	Condition available languages
APAC	Chinese / Korean / Japanese / English
EMEA	French / Italian / Spanish / German / Dutch / Bulgarian / Czech / English / Hungarian / Polish / Portuguese / Romanian
NAM	English
LAM	Portuguese / Spanish / English

As you can see, there are no translation in all languages for every regional condition.

If the contact language is not in this list for his region, then the General Terms and Conditions will be displayed in **English**.

For example, if the chosen region is NAM and the chosen language is French, then the PDF will be in French and the condition in English.

Quote PDF Document

On the top of the page, you can choose

You can:

1. Save the PDF as attachment

By clicking on this button, the document related list.

Google Docs, Notes, & Attachments			Add Google
Action	Type	Title	
Edit View Delete	Attachment	Q-0000000007	
Edit View Delete	Attachment	Q-0000000007	
Edit View Delete	Attachment	Q-0000000007	

2. Save and Send

3. Cancel

By cancelling, you will come back to the

File attachments

Other attachments are allowed before the email is sent. To do so, the user clicks on the "Attach File" button.

Attachments

Attach File

Action	File	Size	Inline
Del	Q-0000000007_V4.pdf	31KB	☐

Y
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File Location	My Personal Documents ▼	Go!	Search in Documents
	My Computer		
	My Personal Documents		
	CWB		
	Conditions (CGV)		
	Public Images		
	Screenshots (for layout)		
	Shared Documents		
	...		
Name	Author	Size	Internal Use Only
Bilingual_2016-01-11.1131	gatia	503KB	☐
Bilingual_2016-01-11.1131	gatia	527KB	☐
Bilingual_2016-01-11.1131_part1 of 2.zip	gatia	843KB	☐
Bilingual_2016-01-11.1131_part2 of 2.zip	gatia	841KB	☐
log_Bilingual_bg_2016-01-11.1131.txt	gatia	11KB	☐
Q-0000000007_V1.pdf	gatia	32KB	☐
Q-0000000007_V2.pdf	gatia	32KB	☐
Q-0000000007_V3.pdf	gatia	32KB	☐
Q-0000000007_V4.pdf	gatia	31KB	☐
Source_en_US_2016-01-08.0313.stf	gatia	564KB	☐
Source_en_US_2016-01-08.0428.stf	gatia	564KB	☐

The limitation of the combined file size is 3 MB

Manage Versioning

When the user saves the pdf as attachment, the system will save it with a new version name.

Google Docs, Notes, & Attachments					Notes & Attachments Help ?
Add Google DocNew NoteAttach FileView All					
Action	Type	Title	Last Modified	Created By	
Edit View Delete	Attachment	Q-0000000007_V3.pdf	24/12/2015 19:03	Geoffray Atlan	
Edit View Delete	Attachment	Q-0000000007_V2.pdf	24/12/2015 19:02	Geoffray Atlan	
Edit View Delete	Attachment	Q-0000000007_V1.pdf	24/12/2015 19:02	Geoffray Atlan	

You will find on this related list information such as the title of the document and when it has been created.

Quoted Document - Sending In

Task

Send an Email

Help for this Page

Send

Select Template

Attach File

Check Spelling

Cancel

Edit Email

Required Information

Email Format

Text-Only [Switch to HTML]

To

John Smith

Related To

Quote

Q-0000000007

Additional To:

CC:

BCC:

geoffray.atlan-ext@soivay.com

Subject

Customer Offer : Q-0000000007

Body

Dear John Smith,
Please find attached the customer offer.
Best Regards

Send

Select Template

Attach File

Check Spelling

Cancel

Attachments

Attach File

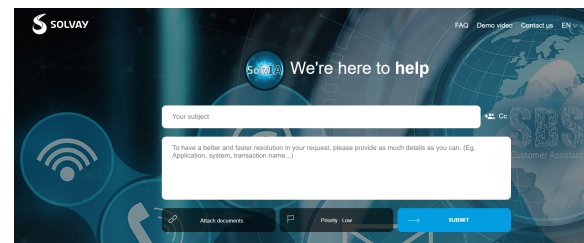
Action	File	Size	Inline
Del	Q-0000000007_V4.pdf	31KB	☐

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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

Related articles

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