

# As a Sales Rep

## Objectives & Values

- View all your assigned commitments on which you need to commit
- Commit for a price on an assigned commitment
- Commit again on a rejected commitment

## Step by Step

1 - Go to the Commitments tab

Setup Help & Training CRM

Analytics Reports Dashboards +

Updated CR  
Adjusted CR  
Account Team Updates  
Requests  
Competitors  
Email Mapping Rules  
Competitive Insights  
Commitments

- Objectives & Values
- Step by Step
  - 1 - Go to the Commitments tab
  - 2 - Select the view "My Commitments (Assigned & Rejected)"
  - 3 - Select one commitment by clicking on its name
    - New field to display the "product dimension"(Read Only)
    - Sales Users can now bring more details with the new field "Comments"
  - 4 - Complete the fields in the section
  - 5 - Change the status to Pending Review
- Related articles
- Need help?

2 - Select the view "My Commitments (Assigned & Rejected)"

Home Need Help Chatter Accounts Contact

My Commitments (Assigned & Rejected) ▼  
My Commitments (Approved)  
My Commitments (Assigned & Rejected)  
My Commitments (Pending Review)

New

3 - Select one commitment by clicking on its name

| <div> <a href="#">Home</a> <a href="#">Need Help</a> <a href="#">Chatter</a> <a href="#">Accounts</a> <a href="#">Contacts</a> <a href="#">Activities</a> <a href="#">Visit Reports</a> <a href="#">Account Plans</a> <a href="#">Cases</a> <a href="#">Opportunities</a> <a href="#">Cross BU Leads</a> <a href="#">Analytics</a> <a href="#">Reports</a> <a href="#">Dashboards</a> </div>                                                                                                                                                                                                        |                                      |              |                       |                    |         |                           |                       |                 |          |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------|--------------|-----------------------|--------------------|---------|---------------------------|-----------------------|-----------------|----------|
| <div> <div> <b>My Commitments (Assigned &amp; Rejected)</b> <a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Create New View</a> </div> <div> <a href="#">List</a> <a href="#">Feed</a> </div> </div>                                                                                                                                                                                                                                                                                                                                                                                        |                                      |              |                       |                    |         |                           |                       |                 |          |
| <div> <div> <a href="#">New Commitment</a> </div> <div> <a href="#">A</a> <a href="#">B</a> <a href="#">C</a> <a href="#">D</a> <a href="#">E</a> <a href="#">F</a> <a href="#">G</a> <a href="#">H</a> <a href="#">I</a> <a href="#">J</a> <a href="#">K</a> <a href="#">L</a> <a href="#">M</a> <a href="#">N</a> <a href="#">O</a> <a href="#">P</a> <a href="#">Q</a> <a href="#">R</a> <a href="#">S</a> <a href="#">T</a> <a href="#">U</a> <a href="#">V</a> <a href="#">W</a> <a href="#">X</a> <a href="#">Y</a> <a href="#">Z</a> <a href="#">Other</a> <a href="#">All</a> </div> </div> |                                      |              |                       |                    |         |                           |                       |                 |          |
| Action                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | Commitment Name                      | GBU          | Customer Code         | Customer Name      | Product | Owner First Name          | Owner Last Name       | Product Manager | Status   |
| <a href="#">Edit</a>   <a href="#">Del</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | <a href="#">Nabs 70-72 "Mrs...</a>   | Special Chem | TP Code Cueros Y...   | TP CODE CUER...    |         | <a href="#">Allen ADM</a> | <a href="#">chung</a> |                 | Assigned |
| <a href="#">Edit</a>   <a href="#">Del</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | <a href="#">Nabs 70-72 "Mrs...</a>   | Special Chem | TP Code Curtac        | TP CODE CURT...    |         | <a href="#">Allen ADM</a> | <a href="#">chung</a> |                 | Assigned |
| <a href="#">Edit</a>   <a href="#">Del</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | <a href="#">Nabs 70-72 "Mrs S...</a> | Special Chem | TP Code Teneria...    | TP CODE TENERI...  |         | <a href="#">Allen ADM</a> | <a href="#">chung</a> |                 | Assigned |
| <a href="#">Edit</a>   <a href="#">Del</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | <a href="#">Na2s 60 "Mrs Cs...</a>   | Special Chem | TP Code Met-Mex...    | TP CODE MET-ME...  |         | <a href="#">Allen ADM</a> | <a href="#">chung</a> |                 | Assigned |
| <a href="#">Edit</a>   <a href="#">Del</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | <a href="#">Na2s 60 "Mrs S2...</a>   | Special Chem | TP Code Curtidos Jv   | TP CODE CURTID...  |         | <a href="#">Allen ADM</a> | <a href="#">chung</a> |                 | Assigned |
| <a href="#">Edit</a>   <a href="#">Del</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | <a href="#">Na2s 60 "Mrs S25...</a>  | Special Chem | TP Code Proces...     | TP CODE PROC...    |         | <a href="#">Allen ADM</a> | <a href="#">chung</a> |                 | Assigned |
| <a href="#">Edit</a>   <a href="#">Del</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | <a href="#">Na2s 60 "Mrs S26...</a>  | Special Chem | TP Code Tecnaal       | TP CODE TECNAAL    |         | <a href="#">Allen ADM</a> | <a href="#">chung</a> |                 | Assigned |
| <a href="#">Edit</a>   <a href="#">Del</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | <a href="#">Na2s 60 "Mrs S25...</a>  | Special Chem | TP Code Liliana Be... | TP CODE LILIANA... |         | <a href="#">Allen ADM</a> | <a href="#">chung</a> |                 | Assigned |

#### 4 - Complete the fields in the section

- New field to display the "product dimension" (Read Only)

| Commitment Detail                |                                                            | [Edit]                               |                                            |
|----------------------------------|------------------------------------------------------------|--------------------------------------|--------------------------------------------|
| Account                          | ASSOCIIT HEALTHCARE PRODUCTS BV                            | Status                               | Approved                                   |
| Contract Name                    | 51660                                                      | Owner                                | <a href="#">H. van der Wal (Change)</a>    |
| Customer Code                    | 51660                                                      | Sales Rep. Email                     | john.van.der.wal@assc.nl                   |
| Product                          | Product 123456789                                          | Product Manager                      | <a href="#">John van der Wal (Change)</a>  |
| Product Level                    | ASSC 3                                                     | On Date                              | 2012/12/18                                 |
| Product Description              | Product 123456789                                          | Group of Activity                    | CBU                                        |
| Is Frozen                        | Yes                                                        | Sub Activity                         | Flax 2                                     |
|                                  |                                                            | Segment Name                         | STANDARD GRNDS - HIGH ACCESS VALUE - LUMEN |
| To be completed by Sales Rep     |                                                            |                                      |                                            |
| Renewed Price (G/LD)             | 961.00                                                     | Expected Volume                      | 75.96                                      |
| Effective Date                   | 2012/12/18                                                 | Negotiation Status                   | Not Started                                |
| Comments                         |                                                            |                                      |                                            |
| Prices                           |                                                            |                                      |                                            |
| Lead Transaction Currency (G/LD) | EUR                                                        | CBU Currency                         | EUR                                        |
| Average Price (G/LD)             | 951.143                                                    | Average Price (CBU Currency)         | 951.143                                    |
| Lead Price (G/LD)                | 951.143                                                    | Lead Price (CBU Currency)            | 951.143                                    |
| Minimum Price (G/LD)             | 178.423                                                    | Minimum Price (CBU Currency)         | 178.423                                    |
| Target Price (G/LD)              | 951.143                                                    | Target Price (CBU Currency)          | 951.143                                    |
| Renewed Price (G/LD)             | 961.00                                                     | Renewed Price (CBU Currency)         | 961.00                                     |
| Label Rate                       | 1.000                                                      | Commitment Rate                      | 1.000                                      |
| Volumes                          |                                                            |                                      |                                            |
| Volume                           | 75.96                                                      | Volume Min                           | 159.96                                     |
| Unit of Measure reference        | 1                                                          | Unit of Measure visualization        | 1                                          |
| Custom Margin                    |                                                            |                                      |                                            |
| Minimum CM                       | <= 12.5 %                                                  | Target CM                            | 0.00 %                                     |
| Average CM                       | 0.00 %                                                     | Renewed CM                           | 0.42 %                                     |
| Round                            |                                                            |                                      |                                            |
| Round Start Date                 | 1/1/2017                                                   | Round                                | 17.93 - Avg Rate                           |
| Round End Date                   | 31/12/2017                                                 | Round Creation Date                  | 2012/12/17                                 |
| Roadmap Target                   |                                                            |                                      |                                            |
| Roadmap Target Price Y3          |                                                            | Roadmap Target Price Y1              |                                            |
| Roadmap Target Volume Y3         |                                                            | Roadmap Target Volume Y1             |                                            |
| System Information               |                                                            |                                      |                                            |
| Commitment Name                  | ASSOCIIT HEALTHCARE PRODUCTS BV/ASSC 31-01-2018/18-12-2018 | ERP Origin                           | KE3                                        |
| Segment Name                     | 51660-51660-ASSC31-01-2018                                 | Material Name                        | 10020-51660                                |
| Variable Circle (G/LD Currency)  | <=0.57                                                     | Material Price                       | 54.000000-10020-51660                      |
| Variable Circle                  | <=0.57                                                     | Round M                              | 2000000-10020-51660                        |
| ERPWH                            | GA-57                                                      | Mapping Key                          | 3020-51660-51660-10020                     |
| Unit                             | 294.57                                                     | Variable Logical Unit                | 171.93                                     |
| OffPayment                       | 0.42 %                                                     | Variable Logical Unit (CBU Currency) | <=19.30                                    |
| Print Count                      | 1                                                          | ERPWH                                | 62-2017                                    |
| Is In Error                      | 1                                                          | OffPayment                           | 5.80                                       |
| Start Date                       | 2012/12/18                                                 | Material                             | 17-10-2018                                 |
| Created By                       | <a href="#">John van der Wal (Change)</a>                  | Last Modified By                     | <a href="#">John van der Wal (Change)</a>  |
|                                  | 2012/12/17 11:38                                           |                                      | 10/12/17 11:34                             |

- Sales Users can now bring more detail with the new field "Comments"

- Price field are not displayed with 3 digits instead of 2 digits

▼ To be completed by Sales Rep

|                      |            |                    |             |
|----------------------|------------|--------------------|-------------|
| Reviewed Price (LTC) |            | Expected Volume    | 2,000,00    |
| Effective Date       | 30/12/2017 | Negotiation Status | Not Started |
| Comments             |            |                    |             |

▼ Prices

|                                 |        |                               |        |
|---------------------------------|--------|-------------------------------|--------|
| Last Transaction Currency (LTC) | USD    | GBU Currency                  | EUR    |
| Average Price (LTC)             | 1,389  | Average Price (GBU Currency)  | 1,283  |
| Last Price (LTC)                | 1,418  | Last Price (GBU Currency)     | 1,283  |
| Minimum Price (LTC)             | 1,326  | Minimum Price (GBU Currency)  | 1,224  |
| Target Price (LTC)              | 1,418  | Target Price (GBU Currency)   | 1,283  |
|                                 |        | Reviewed Price (GBU Currency) |        |
| Latest Rate                     | 0,9046 | Commitment Rate               | 0,9234 |

▼ Volumes

|                           |          |                               |           |
|---------------------------|----------|-------------------------------|-----------|
| Volume                    | 2,000,00 | Volume Min                    |           |
|                           |          | Volume Max                    | 11,800,00 |
| Unit of Measure reference | KG       | Unit of Measure visualization | KG        |

## “To be completed by Sales Rep” :

- Reviewed Price (LTC)
- Effective Date
- Negotiation Status



All other fields are Read only.

If the field **Frozen** is checked, the commitment can't be edited anymore.

## 5 - Change the status to Pending Review

Commitment History (2)

Commitment Detail

Save

Cancel

|                   |                                                   |                          |                      |
|-------------------|---------------------------------------------------|--------------------------|----------------------|
| Account           | ABCR GMBH                                         | Status                   | Pending Review       |
| Customer Name     | ABCR GMBH                                         | Owner                    | Assigned             |
| Customer Code     | 1035981                                           | Sales Rep Name           | Pending Review       |
| Product           | TFAH-BW-F260MESH-P1000Q3-H                        | Sales Rep Email          | Approved             |
| Product Level     | Level 5                                           | Product Manager          | Rejected             |
| Material Code     | 123057                                            | Product Manager Username | Nicolas.Tailardat    |
| Product Dimension |                                                   | Due Date                 | 30/12/2017           |
| Pricing Tool URL  | http://pricingtool-spch.solvay.com/datasetPric... | GBU                      | Special Chem         |
| is Frozen         | <input type="checkbox"/>                          | Group of Activity        | Bu Growth Incubators |
|                   |                                                   | Sub Activity             | Agro & Pharma        |
|                   |                                                   | Tier                     | 2                    |
|                   |                                                   | Segment Name             | TFAH - WORLDWIDE     |

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▼ To be completed by Sales Rep

|                      |            |                    |             |
|----------------------|------------|--------------------|-------------|
| Reviewed Price (LTC) | 35,000     | Expected Volume    | 2,000.00    |
| Effective Date       | 30/12/2017 | Negotiation Status | Not Started |
| Comments             |            |                    |             |

- This commitment will no longer appear in the list view My Commitments (Assigned & Rejected)
- New automated process rules have been set up, depending on the GBU.
  - If the selected GBU is "Special chem" : If the reviewed price you enter is above or equal to the Target Price, the commitment status v from "Pending Review" to "Approved Status"
  - If the selected GBU is "Peroxides" :
    - If  $(\text{Reviewed Price} - \text{Target Price}) / \text{Target Price} \geq -0.05$ , the status is set to "approved"
    - If the Status is "Assigned" and  $\text{Reviewed Price} > 0$  and  $(\text{Reviewed Price} - \text{Target Price}) / \text{Target Price} < 0.05$ , the status is set to "Pending Review"
  - Otherwise :
    - If  $\text{Reviewed Price} \geq \text{Target Price}$ , the status is set to "Approved"
    - If the Status is "Assigned" and  $\text{Reviewed Price} > 0$  and  $\text{Reviewed Price} < \text{Target Price}$ , the status is set to "Pending Review"

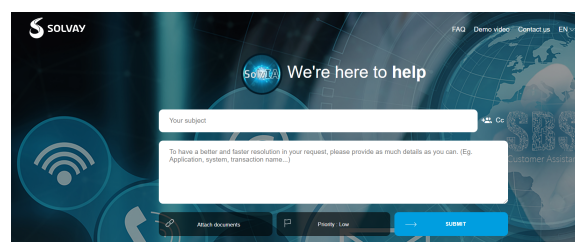
Note that if the *Reviewed Price* you enter is above or equal the *Target Price*, the commitment *Status* will automatically be set to from **Pending R** being saved.

## Related articles

- 04. Quotation

## 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