

Generate a contract from a Quote

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Step by step

[On the quote page :](#)

Click on **Generate Contract**



For reference, it is possible to create a new contract directly from the account.

Quote
Q-0000000983

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Quote Detail

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▼ Information

Quote Name	Q-0000000983	Owner	Julien Andreoli [Change]
Opportunity	test	Status	Accepted
Quote Title	test	Comments for the Approval	
Visibility	Shared	Currency	EUR
GBU	Novecare	Customer Service Representative	Julien Andreoli
BU	Agro	Back Up	
Expiration date	16/02/2017		
Legal Quote Header			

The contract record is displayed

Before submitting a contract for validation, The user has to fill some mandatory fields: start date, end date, contract terms, etc.

Contract C-0000000052 Customize Page | Edit Layout | Printable View | Help for this Page

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Contract Detail Edit Delete Clone Sharing

▼ Status

Draft Pending approval Approved Rejected Signed

▼ Main information

Contract Name	C-0000000052	Owner	Julien Andreoli Change
Visibility	Confidential	Status	Draft
Account Name	ACCOUNT TEST	GBU	Aroma Performance
Account Region	EMEA	BU	Aroma Ingredients
Contract start date	20/02/2017	Quote	C-0000000983
Contract terms	12	Description	
Contract end date	20/02/2018	Signed by (Customer)	
Contract Renewal Alert		Signed date (Customer)	

The contract is divided into 3 sections:

▼ Main information

Contract Name	C-0000000013	Owner	Julien Andreoli Change
Visibility	Confidential	Status	Draft
Account Name	TEST	GBU	Aroma Performance
Legal entity		BU	Aroma Ingredients
Account Region	LAM	Quote	
Contract start date	13/09/2017	Signed by (Customer)	
Contract end date	13/09/2017	Signed date (Customer)	
Contract Duration	0	Solvay's affiliates included	<input type="checkbox"/>
Tacit Renewal (Year)		Partner's affiliates included	<input type="checkbox"/>
Early Termination Notice Date		Geographical scope	
Contract Renewal Alert			
Renegotiation reminder			
Contract Type			

▼ Details

New contract	<input type="checkbox"/>	Amended on	
Key Account	<input type="checkbox"/>	Annual value	
Annual volumes		Duration upon contract length	
Unit of Measure	KG	Covered zones	
Complex contract	<input type="checkbox"/>	Price and formula if any	
Most Favored Customer Provision	<input type="checkbox"/>	Payment Terms	30 Days End of Month
Total Liability Cap (if any)		IncoTerm	
Comments		Others	

▼ Approval Users

User GBU President	Dominique Raze	User WW Business Market Director	Christophe Gas
User Product Line Manager		User WW Marketing Strategy	Mathieu Heit
User WW Legal	Severine Dorazio - INACTIVE	User Zone Commercial Manager	Lucie Morpain
User WW Finance	Emanuele FUSCO	User Zone General Manager	Christophe Gas

In the Main Information section we have the Description field.

This field is displayed on the related list contract on the account.

▼ Main information

Contract Name	C-0000000028
Visibility	Shared
Account Name	FO SHAN FANG FEI LI TE CLEANING LTD
Legal entity	
Account Region	APAC
Contract start date	03/01/2018
Contract end date	03/01/2018
Contract Duration	1
Tacit Renewal (Year)	
Early Termination Notice Date	
Contract Renewal Alert	
Renegotiation reminder	
Contract Type	
Description	

Contracts New Contract

Action	Contract Name	Description	Annual value	Contract start date	GBU
Edit Del	C-0000000028			03/01/2018	Aroma Performance

The contract also has some related list:

Contract Line Items [New Contract Line Item](#) [Contract Line Items Help ?](#)

Action	Contract Line Item Name	Unit of Measure	Price	Volume from	Volume to	Incoterm
Edit Del	CL-0000000054	T	EUR 1 000,00	410,00		

Visit Reports [New Visit Report](#) [Visit Reports Help ?](#)
No records to display

Competitive Insights [New Competitive Insight](#)
No records to display

Activity History [Log a Call](#) [Mail Merge](#) [Send an Email](#)
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Contract Line Item Detail [Edit](#) [Delete](#) [Clone](#)

Contract	C-0000000052	Price revision formula	
Product	ABEX AP 235	Location	
Price	EUR 1 000,00	Incoterm	
Unit of Measure	T		
Volume from	410,00		
Volume to			

If the contract is **generated from a quote**, all quote line item flagged '**accepted**' will be replicated as contract line item.

If the user set the visibility to "confidential", he can extend the visibility of the contract by adding other users in the Contract Team

Contract Team [New Contract Team](#)

Action	User
Edit Del	Julien Andreoli

↓

Contract Team Edit [Save](#) [Save & New](#) [Cancel](#)

Information | = Required Information

Contract	<input type="text" value="C-0000000013"/>	User	<input type="text" value="User"/>
Contract access	<input type="text" value="Read/Edit"/>		

Accesses can be given in read, or read/edit mode

Select the user to share the contract with

Once the user has filled all the necessary fields, he submits his contract for validation



A p p r o v a l p r o c e s s h a s o n l y b e e i m p l e m e n t e d f o r A r o m a P e r f o r m a n c e f o r n o w.

Contract
C-0000000052

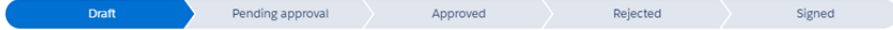
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[Contract Line Items \(1\)](#) | [Visit Reports \(0\)](#) | [Competitive Insights \(0\)](#) | [Activity History \(0\)](#) | [Open Activities \(0\)](#) | [Google Docs, Notes, & Attachments \(0\)](#) | [Approval History \(2\)](#) | [Contract History \(5\)](#)

Contract Detail

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▼ **Status**



▼ **Main information**

Contract Name	C-0000000052	Owner	Julien Andreoli (Change)
Visibility	Confidential	Status	Draft
Account Name	<u>ACCOUNT TEST</u>	GBU	Aroma Performance
Account Region	EMEA	BU	Aroma Ingredients
Contract start date	20/02/2017	Quote	Q-0000000983

The designated approver(s) will receive by email a notification with a link to the contract in SFDC.

*** Internal usage only ***

The Contract C-0000000052 registered in Salesforce by Julien Andreoli has been submitted for approval. Please approve or reject this contract.

You can directly access to the Contract : <https://solvay-crm-devR5.cs88.my.salesforce.com/a1u9E0000008ueC>

Main information :

Contract Number	C-0000000052
Account	ACCOUNT TEST
GBU	Aroma Performance
BU	Aroma Ingredients
Contract Type	

Details :

Contract start date	20/02/2017
Contract terms	12
Contract end date	20/02/2018
Annual value	EUR 1 000,00

THIS IS AN AUTOMATED MESSAGE - Please do not reply

If the user has already submitted his contract but needs to modify an information, he can recall the approval request and explain the reason:

Action	Date	Status	Assigned To	Actual Approver	Comments	Overall Status
Step: Manual (Pending for first approval)						
Reassign Approve / Reject	19/01/2016 17:13	Pending	Yasmina Fares	Yasmina Fares		Pending

Recall Approval Request

Recall Approval Request | Cancel

Related To: S-0000018 | Created By: Geoffray Atlan

Comments:

Action	Date	Status	Assigned To	Actual Approver	Comments	Overall Status
Approval Request Recalled						
	20/01/2016 9:56	Recalled	Yasmina Fares	Geoffray Atlan	The Quality has changed	Recalled

Approbation (for Aroma Performance only)

To approve, the approver needs to go in SFDC and click on "approve/reject", and then approve

Approval History		Recall Approval Request		Approval History Help ?		
Action	Date	Status	Assigned To	Actual Approver	Comments	Overall Status
Step: Step 1 (Pending for first approval)						
Reassign	Approve / Reject	20/02/2017 14:08	Pending	Julien Andreoli	Julien Andreoli	Pending
Approval Request Submitted						
	20/02/2017 14:08	Submitted	Julien Andreoli	Julien Andreoli		



Approve/Reject Approval Request

Contract Name: C-0000000052
Owner: [Julien Andreoli](#)
Comments:

(o r a n s w e r t o t h e m a i l b y " A P P R O V E " o r " R E J E C T ")

The approval process is implemented for Arcom performance of follow through rules:

Duration	Cumulated Commitment	Sales Representative /Key Account Manager (for KA)	Zone Commercial Manager	Zone General Manager (GBU)	WW Business Market Director	PLM	WW Legal	WW Finance	WW Marketing Strategy	GBU President
Spot offers / Annual sales agreements (ex Key Accounts)* Contract length is equal or below one year	< 1000 k€/year	C	V							
	1000 k€ < total value < 3000 k€		C	V	I	I	I	I		
	> 3000 k€/year		C	V	I	V	I	I	I	I
Multi-annual Commercial Contracts (ex Key Accounts)*	total value < 3000 k€		C	V	I	I	I			
	>= 3000 k€		C	C	V	I	I	I	I	I
Key Accounts* 15 key accounts if the checkbox key account is checked	Multi-annual contract	C	I	I	V	I	I	I	I	I
	Annual Contract	C	I	I	I	V	I	I	I	I

Legend :		
C : Creation	I : Informed	V : Validated

The contract is now approved:

The user can finalize

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Contract
C-0000000052

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Contract Detail

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▼ **Status**



▼ **Main information**

Contract Name	C-0000000052	Owner	Julien Andreoli [Change]
Visibility	Confidential	Status	Approved
Account Name	<u>ACCOUNT TEST</u>	GBU	Aroma Performance
Account Region	EMEA	BU	Aroma Ingredients
Contract start date	20/02/2017	Quote	<u>C-0000000083</u>
Contract terms	12	Description	
Contract end date	20/02/2018	Signed by (Customer)	
Contract Renewal Alert		Signed date (Customer)	
Expiration Notice	90 days	Signed by (Solvay)	
Contract Type	NDA	Signed date (Solvay)	

The user wants a task to be created automatically 90 days before the contract end date.

The user tracks here who signed and when.

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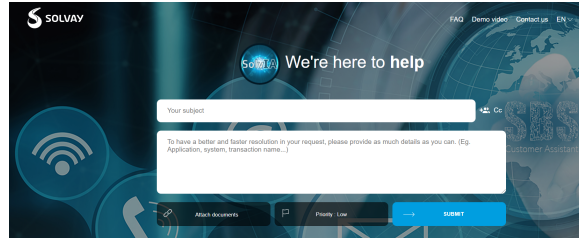
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Need help?

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/>



The screenshot shows the Solvia Freshdesk ticket creation interface. At the top left is the Solvia logo. The main heading is "We're here to help". Below this is a "Your subject" input field with a character count of "0/255". Underneath is a larger text area with a placeholder: "To have a better and faster resolution in your request, please provide as much details as you can. (Eg. Application, system, transaction name...)". At the bottom, there are three buttons: "Attach documents" (with a paper icon), "Priority: Low" (with a dropdown arrow), and "SUBMIT" (in blue).

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