

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

Contract Line Items (1) | Visit Reports (2) | Competitive Insights (2) | Activity History (2) | Open Activities (2) | Google Docs, Notes, & Attachments (2) | Approval History (2) | Contract History (2)

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	LAM	BU	Aroma Ingredients
Contract start date	13/09/2017	Quote	
Contract end date	13/09/2017	Signed by (Customer)	
Contract Duration	0	Signed date (Customer)	
Tacit Renewal (Year)		Solvay's affiliates included	☐
Early Termination Notice Date		Partner's affiliates included	☐
Contract Renewal Alert		Geographical scope	
Renegotiation reminder			
Contract Type			

▼ Details

New contract	☐	Amended on	
Key Account	☐	Annual value	
Annual volumes		Upon contract length	
Unit of Measure	KG	Covered zones	
Complex contract	☐	Price and formula if any	
Most Favored Customer Provision	☐	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	Seyverine Dorazio - INACTIVE	User Zone Commercial Manager	Lucie Morain
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](#)

No records to display

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	C-0000000013	User	User
Contract access	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



Approval process has only been implemented for Aroma Performance for now.



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 \(0\)](#) | [Contract History \(6+\)](#)

Contract Detail

[Edit](#) [Delete](#) [Clone](#) [Sharing](#) [Submit for Approval](#)

▼ Status

Draft

Pending approval

Approved

Rejected

Signed

▼ 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	<u>Q-0000000983</u>

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:

Approval History

Recall Approval Request

Approval History Help ?

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

Recall Approval Request

Recall Approval Request

Cancel

Related To

S-0000018

Created By

Geoffray Atlan

Comments

Approval History

Submit for Approval

Approval History Help ?

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

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

[Approve](#)

[Reject](#)

[Cancel](#)

(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 ARoM a performance indicator follows these:

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

he signing nature of the contract who signed from customer and Solvay side, and when.

Contract

C-0000000052

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[Contract Line Items \(1\)](#) | [Visit Reports \(2\)](#) | [Competitive Insights \(2\)](#) | [Activity History \(2\)](#) | [Open Activities \(2\)](#) | [Google Docs, Notes, & Attachments \(2\)](#) | [Approval History \(4\)](#) | [Contract History \(5\)](#)

Contract Detail

[Edit](#) [Delete](#) [Clone](#) [Sharing](#) [Submit for Approval](#)

Status

Draft

Pending approval

Approved

Signed

Main information

Contract Name	C-0000000052	Owner	Julien Andreoli (Change)
Visibility	Confidential	Status	Approved
Account Name	ACCOUNT TEST	GBU	Aroma Performance
Account Region	EMEA	BU	Aroma Ingredients
Contract start date	20/02/2017	Quote	Q-0000000983
Contract terms	12	Description	
Contract end date	20/02/2018	Signed by (Customer)	
Contract Renewal Alert	 90 days	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.

Finally, the scheduler assigns an automatic reminder before the expiration of the contract:

If needed, the user

Google Docs, Notes, & Attachments

Add Google Doc

New Note

Attach File

No records to display

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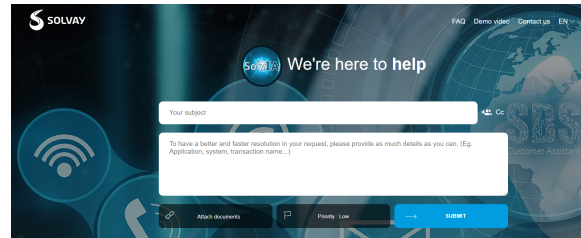
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the process, the user sends the contract to the legal department which will log all information in Contract, Tec

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 image shows a web interface for creating a support ticket. At the top left is the 'S SOLVAY' logo. In the top right corner, there are links for 'FAQ', 'Demo video', 'Contact us', and 'EN'. The main heading is 'We're here to help' with a Solvia logo icon. Below this is a form with a 'Your subject' label and a text input field. A small 'Cancel' button is to the right of the input field. Below the input field is a larger text area with a placeholder message: '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 of the form, there is an 'Attach documents' button with a paper icon, a 'Priority: Low' dropdown menu, and a blue 'SUBMIT' button.

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