

Quote Status Change

Overview

Most of the time, the customer agreement is received by email or phone. The user will then have to update the Quote status and put an accepted or denied value.

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Step By Step

1. If the Quote is rejected, the user enters the denied value in the status field and the process ends.

If the quote is accepted, the user updates the status and an automatic email notification will go to the CSR specified in the CSR field.

Quotes accepted with a "Price validity to" in the past will be automatically set to the "Inactive" status.

The CSR will then create the order in SAP after receiving the purchase order document.

The notification user when an order is created for a specific quote can be done by the CSR through notes or chatter if needed.

Quote Q-0000000024

Quote Line Items (4) | Activity History (2) | Google Docs, Notes, & Attachments (2) | Approval History (2) | Open Activities (2) | Quote History (1)

Quote Detail

Save Cancel

Information

Quote Name: Q-0000000024

Opportunity: Opp Les Aristochats Quote 2

Visibility: GBU

Novicare

BU

Expiration date

Owner: [Name] (Change)

Status: **Denied** (Change)

Currency: [Currency]

CSR: [Name]

Back Up

2. If the Quote is accepted, user updates the status and an automatic email notification will go to the CSR specified in the CSR field.

Note that to be set the status <<Accepted>>, at least one of the quote line items must be flagged as accepted.

Quote Line Item Detail

Quote: Q-0000000983

Product: ABEX AP 235

Other Product name

Minimum order quantity ?

Packaging

Payment terms: 30 Days

Specific Payment Term

include in Reporting / Accepted ☒

3. The user can now fill the Agreement section of the quote:

This section is relevant for GBU which will not use the contract object. If the quote itself is regarding as an agreement:

Contract Informations

Agreement status

Expiration Notice

Expiration Notice before: 14/09/2017

4. In the "Agreement Status", Fernando can set "Send/Signed" to track the status.

Contract Informations

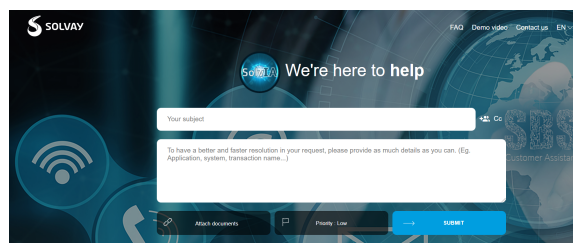
Agreement status

5. "Expiration Notice before" indicates the greater dates of:	Price Validity to 14/09/2017 Volume validity to 01/09/2017 ↓ Expiration Notice before 14/09/2017
6. "Expiration Notice" allows the user to set an automatic reminder (task) X days before the 'Expiration Notice before' value.	Expiration Notice None None 15 days 30 days 45 days 60 days 90 days

Related articles

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