

Quote Creation for Recurrent Business

Overview

In this section, you will find information about the process to create Quotes for Recurrent Business

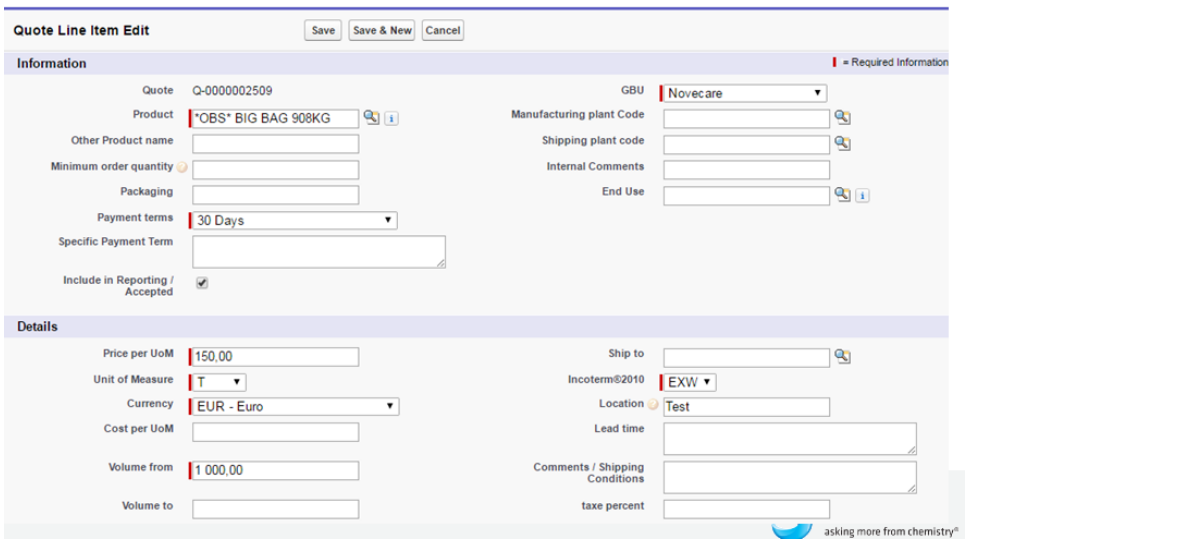
Concerned profiles:

ALL quote owners

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Step By Step


Creation of quote directly for an account	
1. User opens the account page he is interested in, and clicks on New Quote button:	<p>blocked URL</p> <p>blocked URL</p>
2. Once the quote is created, user adds a quote line item and click on save.	


3. At saving, Salesforce will search for existing committed prices for the combinations of the quote and quote line items:

- Ship To /Product /Currency /Unit of measure
- Ship To /Product /Currency /Unit of measure
If a matching commitment is found, a new section is displayed on the quote.

Note: This process is specific to GBUs using pVelocity. If no matching commitment is found, the section will still be displayed but can be collapsed by the user.

▼ Suggested Price

Committed Price ⓘ EUR 180	Difference with Price  -16.67%	Price per UoM EUR 150
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 For more info

- [Transactional Pricing \(Commitments\)](#)

4. The auto calculation of the difference between prices:

(Price per UoM - Committed Price) / Committed Price

The committed price corresponds to the commitment matching with the combination:

- Ship To/Product/Currency/Unit of measure
- Sold To/Product/Currency/Unit of measure

There is an auto calculation of the difference between prices:
 $(Price\ per\ UoM - Committed\ Price) / Committed\ Price$

The « Pricing per UoM » is coming from the quote line item

User adjusted his price using committed price information

User's price is below the price he committed with his manager for the customer and his product. He adjusted his price:

Price per UoM: EUR 150,00 → EUR 180,00

Unit of Measure: EUR

Cost per UoM: EUR

Volume from: 1 050,00

Volume to:

Fernando updates

Suggested Price:

Committed Price: EUR 180

Difference with Price: -16.67% → 0%

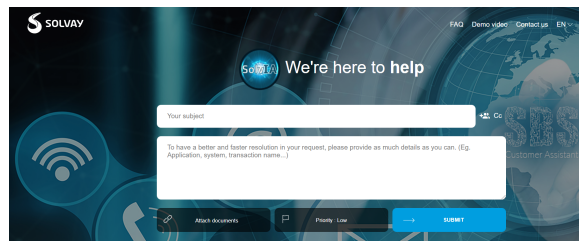
Price per UoM: EUR 150 → EUR 180

Related articles

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

Need help?

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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