

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:

[blocked URL](#)
[blocked URL](#)

2. Once the quote is created, user adds a quote line item and click on save.

Quote Line Item Edit

Save

Save & New

Cancel

Information

Quote

Q-0000002509

Product

OBS BIG BAG 908KG

Other Product name

Minimum order quantity

Packaging

Payment terms

30 Days

Specific Payment Term

Include in Reporting / Accepted

☒

GBU

Novecare

Manufacturing plant Code

Shipping plant code

Internal Comments

End Use

Details

Price per UoM

150,00

Unit of Measure

T

Currency

EUR - Euro

Cost per UoM

Volume from

1 000,00

Volume to

Ship to

Incoterm:2010

EXW

Location

Test

Lead time

Comments / Shipping Conditions

taxe percent

asking more from chemistry®

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)

▼ Suggested Price

Committed Price ⓘ
EUR 180

Difference with Price
-16.67%

Price per UoM
EUR 150

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:
 $(\text{Price per UoM} - \text{Committed Price}) / \text{Committed Price}$

Quote Line Item
QL-0000005023

Quote Line Item Detail

Quote Q-0000002509

Product *CBS* BIG BAG

Other Product name

Minimum order quantity

Packaging

Payment terms 30 Days

▼ Details

Price per UoM EUR 150.00

Unit of Measure

Currency EUR

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:

▼ Details

Price per UoM EUR 150.00

Unit of Measure

Currency EUR

Cost per UoM

Volume from 1 050,00

Volume to

▼ Suggested Price

Committed Price ⓘ
EUR 180

Difference with Price
-16.67%

Price per UoM
EUR 150

Fernando updates

▼ Details

Price per UoM EUR 180.00

Unit of Measure

Currency EUR

Cost per UoM

Volume from 1 050,00

Volume to

▼ Suggested Price

Committed Price ⓘ
EUR 180

Difference with Price
0%

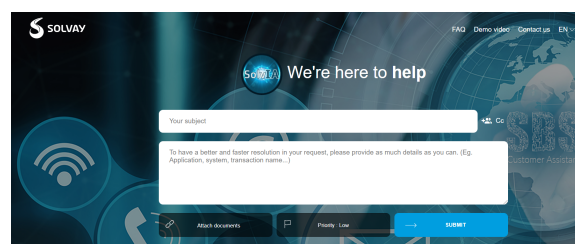
Price per UoM
EUR 180

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?

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