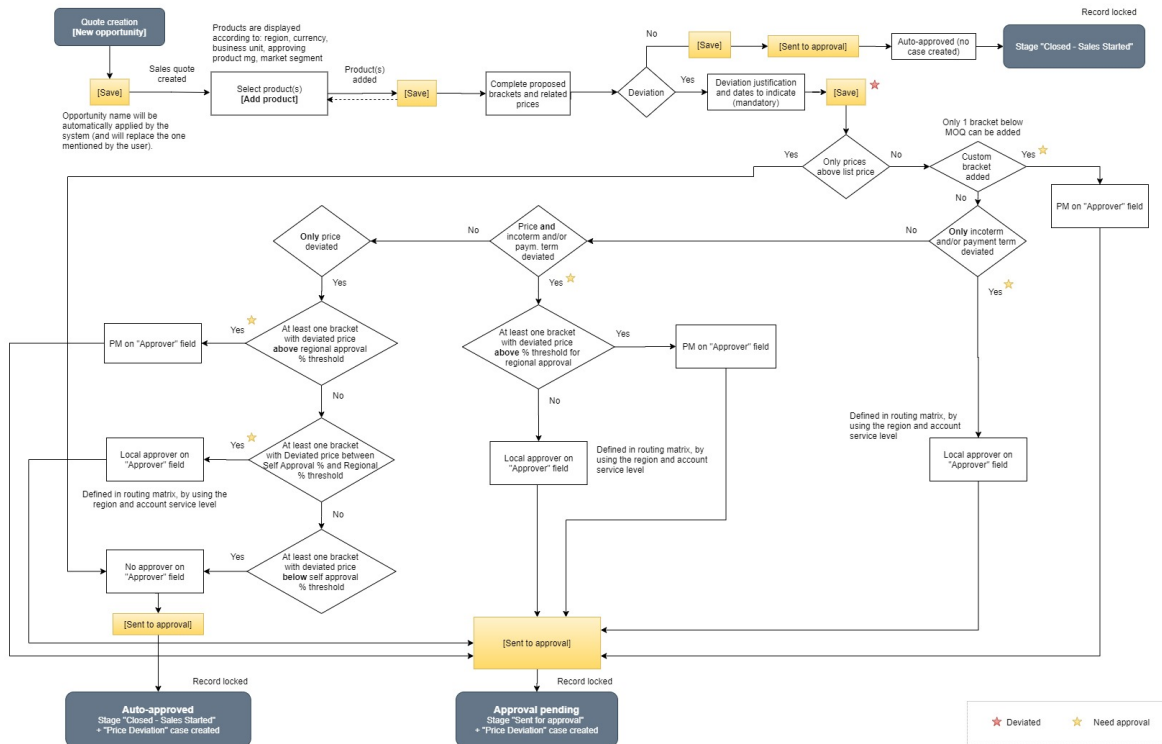


SpP Opportunities

Sales quotes

SALES QUOTES - Creation for all products except Solef ones



Please note that the process for Solef sales quotes is a bit different.
The approving process is the same but yearly quantity and MOQ impact brackets that can be selected.

Note: in 2021, with ECCO project, "Local approver" was replaced by "Sales manager". Please take into consideration this change.
You can find the % threshold in the Product Bracket

The rules for the products to be displayed are products for which the pricing setting match:

- The sales quote Business Unit
- The sales quote Region
- The sales quote Currency
- Potentially the market segment if filled
- Valid from (on pricing setting) < Quotation_Date__c (or today() if Quotation date empty) < valid to (pricing setting)

Example:

Sales quote: Quotation date = 17/02/2020

Product pricing: Valid from = 01/04/2018 / Valid to = 31/01/2020

Here, the product will not be displayed because the quotation date doesn't match.

First, check that Business Unit at the sales quote level matches with the one of the product.

Then go on product page > Related tab > Pricing settings section (without clicking on it for now):

Step 1 - Price has to be valid (valid_active = ticked) and "Quotation Date" has to be on the corresponding period. If it isn't, go to the last paragraph*. If there is an active price, click on product pricing name and follow step 2.

Step 2 [Related tab of Product pricing] - On "Product Settings" section, you will see a list of pricing setting names. Market segment and currency have to match with information on the sales quote. Note that if market segment is empty at the product level, it means that all market segment indicated on the sales quote match with the corresponding line. If a market segments is indicated instead, then it has to be the same value than the one on the sales quote. If values don't match, go to the last paragraph*. If you can't detect any problem, click on the correct pricing setting and go to step 3.

Step 3 [Details tab of Pricing setting] - Visibility field: if there is no value, go to the last paragraph*. The user can't see the price related to her/his region because visibility wasn't set. Log in as the user and go on "Product Pricing" tab to verify this. Example: if a European user can't see Europe prices, she/he will not be able to add it on the sales quote neither. If visibility is correct (region restricted or shared), then go to step 4.

Step 4 [Related tab of Pricing setting] - Click on "Related" tab and check product's brackets. First bracket has to start with value of MOQ (indicated on "Details" tab). If after following all these steps, you can't find any explanations, please check with the functional or Inès. If a bracket is missing, please go to the last paragraph*.

Please keep in mind that 4 level have to be checked when investigating: product page > product pricing > pricing settings > product brackets.

*Data issue? Contact the Data Steward with the Product Manager in Cc if you detected an issue related to the product.

"Yearly quantity" field defines which brackets is selected:

- If there is no custom bracket, then refer to the "From" value of the brackets. They have to be > or = to MOQ and < or = to Year quantity. Brackets which match will be free to edit with a green color line. Other will be locked and greyed out.
- If there is a custom bracket (always below MOQ, impossible to add one above it), then Yearly quantity has to be included on the custom bracket ("From-to" value). The corresponding bracket will be free to edit with a red color line.

On sales quotes, products that can be added depends on information you indicated on "Details".

In order to be able to change this information (expiration date, market segment, etc.), you have to follow the following steps:

1. Delete your product(s)
2. Change information
3. Add your product(s) again

Anyone who can create or modify quotes.

Orange background is displayed when the price is pulled from an expired sales quotes (not the stage but the checkbox Expired__c = true). This flag is updated to true for quotes where the "Deviation Valid To" is equals or below the "Deviation Valid From" of a new sales quote approved for the same account and the product.

Development pools

Check the close date. If close date is 2016, then sales users will receive notifications in 2016 and 2017.

Rule is close date year and close date year+1. Notifications are sent in January, July, October and April. Cf. [SCME-1159](#) for more details.

Go on the product page to validate that the product is active. On "System Information" section, "Active" has to be ticked.

If the product is active, you then have to check information on the "Related" tab:

- Product Pricings: valid_activ has to be ticked for the corresponding period
- Price Books: you have to see a line which match with the opportunity currency (even if the value is 0, what is important is to have it here).