

16. Contract Management

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Managing Customer Needs

Objectives & Values

Contract is the final part of the sales cycle, tracking the commitments taken with the customer.

Managing contract inside Salesforces can move our deals forward by:

- Making available all information to the SalesReps and their managers (details of volume, price, expiration date, etc.) at any time.
- Managing the complete approval process in SFDC
- Setting an automatic reminder before the expiration date.

We can implement features, such as:

- Contract approval process
- Contract renewal alert

Transactional Pricing aims at reducing price dispersion amongst similar customers, and can be applied to most products.

Without transactional pricing, price increases are often focused on the same customers, with the risk of eventually losing them

Contract management:

- Create a contract from an accepted quote or directly from an account
- Add a product or modify an actual product
- Enter Product details (price, volume,..)
- As submitter, submit the contract for approval to the approver if the approval is necessary
- As approver: accept, reject or reassign the request for approval of the Contract.
- Manage versioning with cloning
- Manage visibility
- Set Contract Renewal Alert

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Your subject + Cc

To have a better and faster resolution in your request, please provide as much details as you can. (Eg. Application, system, transaction name...)

Attach documents Priority : Low → SUBMIT

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