

As a Sales Rep

Objectives & Values

- View all your assigned commitments on which you need to commit
- Commit for a price on an assigned commitment
- Commit again on a rejected commitment

Step by Step

1 - Go to the Commitments tab

SetupHelp & TrainingCRM

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Updated CRAdjusted CRAccount Team UpdatesRequestsCompetitorsEmail Mapping RulesCompetitive InsightsCommitments

- Objectives & Values
- Step by Step
 - 1 - Go to the Commitments tab
 - 2 - Select the view "My Commitments (Assigned & Rejected)"
 - 3 - Select one commitment by clicking on its name
 - New field to display the "product dimension"(Read Only)
 - Sales Users can now bring more details with the new field "Comments"
 - 4 - Complete the fields in the section
 - 5 - Change the status to Pending Review
- Related articles
- Need help?

2 - Select the view "My Commitments (Assigned & Rejected)"

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My Commitments (Assigned & Rejected)▼My Commitments (Approved)My Commitments (Assigned & Rejected)My Commitments (Pending Review)

New

3 - Select one commitment by clicking on its name

[illegible]

4 - Complete the fields in the section

- New field to display the "product dimension" (Read Only)

Commitment Detail				8481			
Account				Status			
Customer Name				Owner			
Customer Code				Sales Rep Name			
Product				Sales Rep Email			
Product Lead				Product Manager			
Product Description				Product Manager Email			
Is Frozen				Due Date			
				Forecast			
				Group of Activity			
				Sub Activity			
				Tag			
				Segment Name			
* To be completed by Sales Rep				Negotiation Status			
Received Price (LTD)				Expected Volume			
Effective Date				Negotiation Status			
Comments							
* Prices							
Last Transaction Currency (LTD)				OSB Currency			
Average Price (LTD)				Average Price (OSB Currency)			
Last Price (LTD)				Last Price (OSB Currency)			
Minimum Price (LTD)				Minimum Price (OSB Currency)			
Target Price (LTD)				Target Price (OSB Currency)			
Latest Rate				Renewed Price (OSB Currency)			
				Commitment Rate			
* Volumes							
Volume				Volume Min			
Unit of Measure reference				Volume Max			
				Unit of Measure visualization			
* Custom Margin							
Minimum CM				Target CM			
Average CM				Renewed CM			
* Round							
Round Start Date				Round Name			
Round End Date				Round Creation Date			
* Readmap Target							
Readmap Target Price Y0				Readmap Target Price Y1			
Readmap Target Volume Y0				Readmap Target Volume Y1			
* System Information							
Commitment Name				ERP Origin			
Salesperson				Salesperson			
Variable Code (OSB Currency)				Salesperson Email			
Variable Code				Round by			
ERP Price				Planning Key			
CM				Variable Logicals Code			
Difference				Variable Logicals Code (OSB Currency			

- Sales Users can now bring more detail with the new field "Comments"

- Price field are not displayed with 3 digits instead of 2 digits

▼ To be completed by Sales Rep

Reviewed Price (LTC)		Expected Volume	2,000,00
Effective Date	30/12/2017	Negotiation Status	Not Started
Comments			

▼ Prices

Last Transaction Currency (LTC)	USD	GBU Currency	EUR
Average Price (LTC)	1,389	Average Price (GBU Currency)	1,283
Last Price (LTC)	1,418	Last Price (GBU Currency)	1,283
Minimum Price (LTC)	1,326	Minimum Price (GBU Currency)	1,224
Target Price (LTC)	1,418	Target Price (GBU Currency)	1,283
		Reviewed Price (GBU Currency)	
Latest Rate	0,9046	Commitment Rate	0,9234

▼ Volumes

Volume	2,000,00	Volume Min	
		Volume Max	11,800,00
Unit of Measure reference	KG	Unit of Measure visualization	KG

“To be completed by Sales Rep” :

- Reviewed Price (LTC)
- Effective Date
- Negotiation Status



All other fields are Read only.

If the field **Frozen** is checked, the commitment can't be edited anymore.

5 - Change the status to Pending Review

Commitment History (2)

Commitment Detail

Save

Cancel

Account	ABCR GMBH	Status	Pending Review
Customer Name	ABCR GMBH	Owner	Assigned
Customer Code	1035981	Sales Rep Name	Pending Review
Product	TFAH-BW-F260MESH-P1000Q3-H	Sales Rep Email	Approved
Product Level	Level 5	Product Manager	Rejected
Material Code	123057	Product Manager Username	Nicolas.Taillardat
Product Dimension		Due Date	30/12/2017
Pricing Tool URL	http://pricingtool-spch.solvay.com/datasetPric...	GBU	Special Chem
is Frozen	☐	Group of Activity	Bu Growth Incubators
		Sub Activity	Agro & Pharma
		Tier	2
		Segment Name	TFAH - WORLDWIDE

▼ To be completed by Sales Rep

Reviewed Price (LTC)	35,000	Expected Volume	2,000.00
Effective Date	30/12/2017	Negotiation Status	Not Started
Comments			

- This commitment will no longer appear in the list view My Commitments (Assigned & Rejected)
- New automated process rules have been set up, depending on the GBU.
 - If the selected GBU is "Special chem" : If the reviewed price you enter is above or equal to the Target Price, the commitment status v from "Pending Review" to "Approved Status"
 - If the selected GBU is "Peroxides" :
 - If $(\text{Reviewed Price} - \text{Target Price}) / \text{Target Price} \geq -0.05$, the status is set to "approved"
 - If the Status is "Assigned" and $\text{Reviewed Price} > 0$ and $(\text{Reviewed Price} - \text{Target Price}) / \text{Target Price} < 0.05$, the status is set to "Pending Review"
 - Otherwise :
 - If $\text{Reviewed Price} \geq \text{Target Price}$, the status is set to "Approved"
 - If the Status is "Assigned" and $\text{Reviewed Price} > 0$ and $\text{Reviewed Price} < \text{Target Price}$, the status is set to "Pending Review"

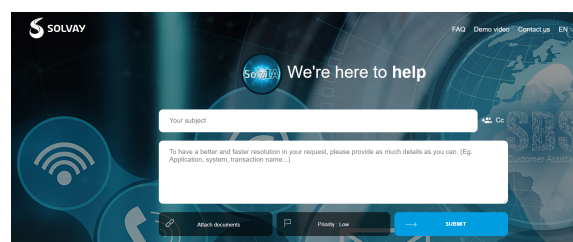
Note that if the *Reviewed Price* you enter is above or equal the *Target Price*, the commitment *Status* will automatically be set to from **Pending R** being saved.

Related articles

- 04. Quotation

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