

# 14. Transactional Pricing (Commitments)

## 14. Transactional Pricing (Commitments)



Managing Customer Needs

### Objectives & Values

**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.



#### Integration with Quote

Sales Reps commit to prices at Account/Product level. The aim is to provide commitment information to Sales Reps when they quote : if the combination Account/Product of the quote match an active commitment, the committed price will be automatically displayed on the Quote layout to help the Sales Reps set their prices.

- [Quote Creation for Recurrent Business](#)

### Table of content

- [General Process from pVelocity to SFDC](#)
- [As a Sales Rep](#)
- [As a Product Manager](#)
- [As a pVelocity Admin in Salesforce](#)

## Managing Commitments in the CRM will help you by :

#### As a Sales Rep you can :

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

#### As a Product Manager you can :

- View all the commitments you need to approve or reject
- Approve or Reject a commitment

#### As a pVelocity admin in Salesforce you can :

- Edit any commitment regardless of its status and if it frozen or not

## Commitments Security

**All profiles can only read and edit records (except Salesforce admins).**

**All fields are read only except :**

- Reviewed Price
- Effective date
- Status
- is Contract
- Status of Negotiation

## Commitments Rules

|                        |                                                                                                                                                                                                                                                                                                                                 |
|------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Who can create?</b> | Commitments are created by pVelocity<br><br>No commitment is created directly in Salesforce                                                                                                                                                                                                                                     |
| <b>Who can see?</b>    | A commitment is visible by its owner, the related product manager (provided by pVelocity)<br>Commitments can also be visible by the Sales Rep manager in the role hierarchy                                                                                                                                                     |
| <b>Who can update?</b> | A commitment can be updated by its owner, the related product manager (provided by pVelocity)<br>Commitments can also be updated by the Sales Rep manager in the role hierarchy                                                                                                                                                 |
| <b>Who can delete?</b> | As pVelocity admins can't delete commitments directly, commitments are flagged to be deleted by pVelocity<br><br>After that only System Administrators can delete them by DataLoader<br><br>Commitment marked for deletion are no longer visible by non admin users<br><br>Salesforce admins can delete Commitments at any time |

### New List views on Commitment

12 new list views have been created, to allow any user to access commitment. They are filtered on :

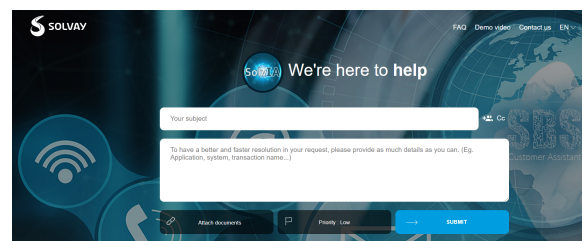
- GBU
- Status

## 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*