

Define the Quote Team

Overview

In this section, you will find information about the process to add members in the Quote team

Concerned profiles:

ALL quote owners

Step By Step

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1

David opens his new quote for which he wants to add Pedro in the team

Quote Line Items | Contracts | Quote Team | Approval History | Google Docs, Notes, & Attachments | Open Activities | Activity History | Quote History

Quote Detail

Information

Quote Name: Q-0000001823

Opportunity: New opportunity

Quote Title: New opportunity 22334

Visibility: Shared

GBU: Aroma Performance

BU: Aroma Ingredients

Quote Validity Date: 18/05/2017

Legal Quote Header:

Owner: David Anderson

Status: Accepted

Comments for the Approval:

Currency: EUR

Customer Service Representative: Daniel Abhijeet

Back Up:

2

He hovers the Quote Team and discovers he's already in the team! He now clicks on New Quote Team in order to add Pedro in the team

Quote Line Items | Contracts | Quote Team | Approval History | Google Docs, Notes, & Attachments | Open Activities

Quote Team

Action

User

Quote access

Edit | Del

Daniel Abhijeet

Read/Edit

Edit | Del

Charles Lachalze

Read/Edit

Edit | Del

David Anderson

Read/Edit

visibility: Shared

GBU: Aroma Performance

BU: Aroma Ingredients

Quote Validity Date: 18/05/2017

Legal Quote Header:

Currency: EUR

Customer Service Representative: Dani

Back Up:

3

David must now click on the Look-up to open the search windows

Quote Team Edit

New Quote Team

Quote Team Edit

Information

Quote: Q-0000001823

Quote access: --None--

User: User

Save

Save & New

Cancel

4

Once the window open, he se arches for **Pedro** and cli cks on Pedro's name

The image shows a Salesforce 'Lookup' dialog box. At the top, there is a search bar with the text 'pedro' and a 'Go!' button. Below the search bar, there are radio buttons for 'Name' (selected) and 'All Fields'. A link '< Clear Search Results' is visible. The 'Search Results' section shows a table with one entry: 'Pedro Pinto'. The table has columns for 'Full Name', 'Title', 'Phone', and 'Email'. The 'Full Name' column is highlighted with a red box. Below the table, there is a copyright notice: 'Copyright © 2000-2015 salesforce.com, inc. All rights reserved.'

Full Name	Title	Phone	Email
Pedro Pinto	Commercial Excellence Process Manager	3222643405	pedro.pinto=solvay.com@example.com

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Before saving, David defines Pedro's quote access. When he's finished, he clicks on **Save**.

The image shows a Salesforce 'New Quote Team' dialog box. At the top, there is a 'Quote Team Edit' section with 'Save', 'Save & New', and 'Cancel' buttons. Below this, there is an 'Information' section. In the 'Information' section, there is a 'Quote' field with the value 'Q-0000001823' and a search icon. To the right of the 'Quote' field, there is a 'User' dropdown menu with 'User' selected and 'Pedro Pinto' listed. Below the 'Quote' field, there is a 'Quote access' dropdown menu with 'Read/Edit' selected. The 'Quote access' dropdown menu is highlighted with a red box. At the bottom of the dialog, there are 'Save', 'Save & New', and 'Cancel' buttons. The 'Save' button is highlighted with a red box.

Quote Team Edit

Save Save & New Cancel

Information

Quote Q-0000001823 User User Pedro Pinto

Quote access Read/Edit

Save Save & New Cancel



Read / Write : give the permission to the team member to edit the quote

Read Only : give visibility permission only

7

It's done! David has added Pedro in the team.

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Pedro can now make the quote evolve and update some data

Quote Team		
New Quote Team		
Action	User	Quote access
Edit Del	Daniel Abhijeet	Read/Edit
Edit Del	Charles Lachalze	Read/Edit
Edit Del	David Anderson	Read/Edit
Edit Del	Pedro Pinto	Read/Edit

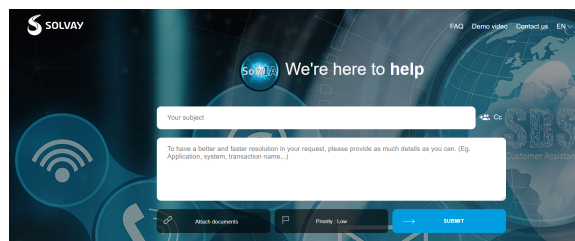
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Related articles

- [Definition, Objectives and Types of Opportunities](#)
- [Create a New Opportunity](#)
- [Clone an Existing Opportunity](#)
- [Follow the Opportunity Stages – Add Contacts in the Involved Contacts](#)
- [Follow the Opportunity Stages – Add Accounts in the Involved Accounts](#)
- [Negociate to win](#)
- [Close the Opportunity](#)
- [Competitive insights - Create a Competitive Insight](#)
- [Cross BU Leads – Create a Cross BU Lead](#)
- [Introduction to Quote Process Management](#)

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