

Quote Creation for Recurrent Business

Overview

In this section, you will find information about the process to create Quotes for Recurrent Business

Concerned profiles:

ALL quote owners

Table of content

- [Step By Step](#)
 - [Creation of quote directly for an account](#)
 - [User adjusted his price using committed price information](#)
- [Related articles](#)
- [Need help?](#)

Step By Step

Creation of quote directly for an account

1. User opens the account page he is interested in, and clicks on New Quote button:

[blocked URL](#)
[blocked URL](#)

2. Once the quote is created, user adds a quote line item and click on save.

Quote Line Item Edit

Save

Save & New

Cancel

Information

Quote

Q-0000002509

Product

OBS BIG BAG 908KG

Other Product name

Minimum order quantity

Packaging

Payment terms

30 Days

Specific Payment Term

Include in Reporting / Accepted

☒

GBU

Novecare

Manufacturing plant Code

Shipping plant code

Internal Comments

End Use

Details

Price per UoM

150,00

Unit of Measure

T

Currency

EUR - Euro

Cost per UoM

Volume from

1 000,00

Volume to

Ship to

Incoterm:2010

EXW

Location

Test

Lead time

Comments / Shipping Conditions

taxe percent

asking more from chemistry®

3. At saving, Salesforce will search for existing committed prices for the combinations of the quote and quote line items:

- Ship To /Product /Currency /Unit of measure
- Ship To /Product /Currency /Unit of measure
If a matching commitment is found, a new section is displayed on the quote.

Note: This process is specific to GBUs using pVelocity. If no matching commitment is found, the section will still be displayed but can be collapsed by the user.

▼ Suggested Price

Committed Price ⓘ

EUR 180

Difference with Price



-16.67%

Price per UoM

EUR 150



For more info

- [Transactional Pricing \(Commitments\)](#)

4. The auto calculation of the difference between prices:

(Price per UoM - Committed Price) / Committed Price

Quote Line Item
QL-0000005023

Quote Line Item Detail

Quote Q-0000002509

Product *CBS* BIG BAG

Other Product name

Minimum order quantity

Packaging

Payment terms 30 Days

Details

Price per UoM EUR 150.00

Unit of Measure

Currency EUR

The « Pricing per UoM » is coming from the quote line item

There is an auto calculation of the difference between prices:
 $(Price\ per\ UoM - Committed\ Price) / Committed\ Price$

User adjusted his price using committed price information

User's price is below the price he committed with his manager for the customer and his product. He adjusted his price:

Details

Price per UoM EUR 150.00

Unit of Measure

Currency EUR

Cost per UoM

Volume from 1 050,00

Volume to

Suggested Price

Committed Price EUR 180

Difference with Price -16.67%

Price per UoM EUR 150

Fernando updates

Details

Price per UoM EUR 180.00

Unit of Measure

Currency EUR

Cost per UoM

Volume from 1 050,00

Volume to

Suggested Price

Committed Price EUR 180

Difference with Price 0%

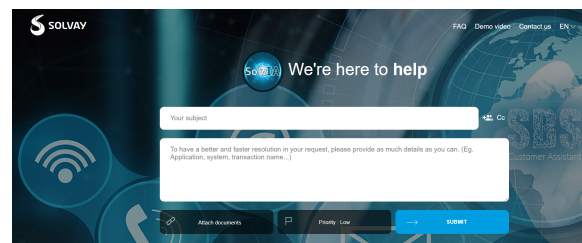
Price per UoM EUR 180

Related articles

- [Quote Creation from a Growth Business Opportunity.](#)
- [Quote Mass Clone](#)
- [Quote Mass Update](#)
- [Quote Manual Sharing](#)
- [Quote Approval Process](#)
- [Quote communication](#)
- [Quote Email Template creation](#)
- [Create a New Opportunity](#)
- [Clone an Existing Opportunity](#)
- [Definitions, Types of Opportunities & Process](#)

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