

Quote Creation

Overview

In this section, you will find information about the process to create a quote from a recurrent business opportunity and from a growth business opportunity, including:

- How to actually create a quote in Salesforce
- What information is copied and prefilled in the quote
- What information is needed to save the quote
- How to add product information

Concerned profiles:

ALL

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 - Information copied and prefilled in the quote
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Step By Step

How to create a quote from a Growth business opportunity

Once the sales rep has created a growth business opportunity and needs to send a quote to the customer, he will click the “create quote” button in the opportunity page.


Opportunity
Opps Test

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Opportunity Detail

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▼ Status

1 - Quality

2 - Lab Testing

3 - Industrial testing

4 - Negotiate

5 - Closed Lost

5 - Closed Won

Note

▼ Opportunity Information

Information copied and prefilled in the quote

Then the user will arrive on the quote edit page with some prefilled information. All prefilled information are listed below.

Fields	Value coming from	Value
Opportunity	Opportunity name	Depending on the opportunity
Visibility	Opportunity visibility	Depending on the opportunity
GBU	Opportunity GBU	Depending on the opportunity
BU	Opportunity BU	Depending on the opportunity
Status	Defaulted value	Draft
Currency	Opportunity currency	Depending on the opportunity
Template	Defaulted value	Detailed
Template language	Contact's language	Depending on the contact
Account	Opportunity's account	Depending on the opportunity
Primary contact	Opportunity contact	Depending on the opportunity
Invoice periodicity	Defaulted value	Monthly invoicing

Other information needed to save the quote

Some other information not prefilled are mandatory to save the quote:

Field	Field type
Price <u>validity from</u>	Date
Price <u>validity to</u>	Date
Expiration date	Date

Optional Quote Information

The user fills all the information in the quote header

Quote Edit Save Save & New Cancel

Information

Opportunity Owner Françoise Coussey
 Quote Title Status
 Visibility Comments for the Approval
 OBU Currency
 BU Customer Service Representative
 Expiration date
 Legal Quote Header

Other quote information

Specific Requirements Template
 Specific conditions Template Language
 Description General Lead time

Sold to Account information

Account

Contact Details

Primary Contact

Pricing information

Incoterm@2010 Price Validity from
 Location Price Validity to
 Payment terms Volume validity from
 Specific Payment Term Volume validity to
 Extra Charges
 Extra Charges info
 Price per quarter
 Invoice periodicity
 Specific Invoice Periodicity

Shipping information

Ship to

Legal entity

Legal entity City*
 Legal entity name* Country*
 Address line 1* Phone number
 Address line 2 Zip code

Contract Informations

Agreement status Expiration Notice

Save Save & New Cancel

Then the user clicks on **Save** and quote is saved with related quote line items.

Quote Line Items New Line Item Mass Update Quote

Action	Quote Line Item Name	Product	Price per UoM	Volume	Incoterm
☐ Edit Del	QL-0000000057	(RR) METHYL DUPHOS	EUR 500,00	2 (Kg)	FCA
☐ Edit Del	QL-0000000059	(RR) METHYL DUPHOS	EUR 500,00	2 (Kg)	EXW
☐ Edit Del	QL-0000000060	(RR) METHYL DUPHOS	EUR 500,00	2 (Kg)	FAS
☐ Edit Del	QL-0000000061	(RR) METHYL DUPHOS	EUR 500,00	2 (Kg)	FAS

Quote Line Items New Line Item Mass Update Quote Line Items Help

Action	Quote Line Item Name	Product	Price per UoM	Volume	Incoterm@2010	Ship to	Location	Committed price	Include in Reporting / Accepted
☐ Edit Del	QL-00000007974	ZEOSIL 111 BIG BAG 280KG	EUR 58,00	45 (KG)	FAS	ACCOUNT TEST			✓
☐ Edit Del	QL-00000007973	ZEOSIL 111 BIG BAG 280KG	EUR 45,00	45 (KG)	FAS	ACCOUNT TEST			✓
☐ Edit Del	QL-00000007997	ZEOSIL 111 BIG BAG 280KG	EUR 45,00	45 (KG)	FAS	ACCOUNT TEST			✓

"Location" is now displayed in the Quote line item related list.

Release R7

It is now possible to link several contacts to a quote with the "Customer Contacts" related list. When a quote is cloned the customer contacts will also be cloned.

Customer Contacts					
New Customer Contact			Customer Contacts Help ?		
Action	Contact Name	Email	Mobile	Phone	Role
Edit Del	John Smith	dev@balink.net		6566666	Participant

Product information

All product related information is handled in the quote line items. The information of the quote line items are prefilled with available data in the product information section of the opportunity.

In the quote line item the information that can be handled are the following

Quote Line Item Detail Edit Delete Clone Mass Clone

Quote Q-0000000982 GBU Novacare

Product ABEX AP 2500 Manufacturing plant Code

Other Product name Manufacturing plant

Minimum order quantity Shipping plant code 5B12

Packaging Shipping plant SCHM-US /KANORADO B. ROUGE

Payment terms 30 Days Internal Comments

Specific Payment Term End Use ADDITIVES FOR ARCHITECTURAL PAINTS

Include in Reporting / Accepted ☒

▼ Details

Price per UoM EUR 12,00 Ship to

Unit of Measure Sh. T IncotermS2010

Currency EUR Location

Cost per UoM Lead time

Volume from 55 555,00 Comments / Shipping Conditions

Volume to tax percent

Price All taxes incl.

▼ Informations

Freight cost Freight cost info.

Rebate (%) Rebate info.

Specific discount (%) Specific discount info.

▼ Product Concentration Details

Concentration (%) 30,00 % Price for 100% concentration EUR 12,00

Pricing method (%) 100,00 % Volume for 100% concentration 55 555,00

Rebate is now a free text field, % or amount can be set.

Release R6

Quote Line Item Detail Edit Delete Clone Update Competitive Insights Mass Clone

Quote Q-0000003704 GBU Soda Ash & Derivatives

Product ZEOSIL 111 BIG BAG 280KG Manufacturing plant Code

Other Product name Manufacturing plant

Minimum order quantity Shipping plant code

Packaging Shipping plant

Payment terms 30 Days from invoice date Internal Comments

Specific Payment Term End Use

Include in Reporting / Accepted ☒ Year 2 019

▼ Details

Price per UoM EUR 58,00 Ship to

Unit of Measure Sh. T IncotermS2010

Currency EUR Location

Cost per UoM Lead time

Volume from 45 000,00 Comments / Shipping Conditions

Volume to tax percent

Price All taxes incl.

▼ Informations

Freight cost Freight cost info.

Rebate (%) Rebate info.

Specific discount (%) Specific discount info.

▼ Product Concentration Details

Concentration (%) 30,00 % Price for 100% concentration EUR 12,00

Pricing method (%) 100,00 % Volume for 100% concentration 55 555,00

If the field "Year" is filled, it will be displayed in the PDF.

A new field "Year" is now available on quote line item to manage multi year offers for larger customer; you can create quote with prices by year.

Release R7

Year	Country	Ship to	Product	Volume	IncotermS2010	Price per UoM	Payment terms
2017	Portugal	ACCOUNT TEST	ZEOSIL 111 BIG BAG 280KG - 115278	45.00 (KG)	FAS - LISBOA	58.00 (EUR) / KG	30 Days from invoice date
2018	Portugal	ACCOUNT TEST	ZEOSIL 111 BIG BAG 280KG - 115278	45.00 (KG)	FAS - LISBOA	45.00 (EUR) / KG	30 Days from invoice date
2019	Portugal	ACCOUNT TEST	ZEOSIL 111 BIG BAG 280KG - 115278	45.00 (KG)	FAS - LISBOA	45.00 (EUR) / KG	30 Days from invoice date

Quote Line Item Detail Edit Delete Clone Update Competitive Insights Mass Clone

Quote Q-0000003704 GBU Soda Ash & Derivatives

Product ZEOSIL 111 BIG BAG 280KG Manufacturing plant Code

Other Product name Manufacturing plant

Minimum order quantity Shipping plant code

Packaging Shipping plant

Payment terms 30 Days from invoice date Internal Comments

Specific Payment Term End Use

Include in Reporting / Accepted ☒ Year 2 019

At the level of the quote or the quote line item, if the "specific payment term" field is filled it will be displayed on the PDF (for the 3 type of templates). If it's blank it will not be displayed.

Release R7

The user fills the price and the volume for each product included in the quote.

Let's have a closed look to pure /diluted quotation process:

For the GBUs **So da Ash** and **Peroxides** unless the user sets manually "100%" during quote line item creation, the pricing method will be set automatically with the value of the product concentration.

▼ Details

Price per UoM	EUR 12,00	Ship to	
Unit of Measure	Sh. T	Incoterm®2010	
Currency	EUR	Location	
Cost per UoM		Lead time	
Volume from	55 555,00	Comments / Shipping Conditions	
Volume to		taxe percent	
		Price All taxes incl.	

▼ Product Concentration Details

Concentration (%)	30,00 %	Price for 100% concentration	EUR 12,00
Pricing method (%)	100,00 %	Volume for 100% concentration	55 555,00

"Concentration" (read only): It displays the real concentration of the product.

"Pricing method": determines the way you will do your quotation.

- The field can only have 2 values : 'the concentration of the product' (displayed above) or '100%' (pure product).
- If you set the 'product concentration', it means the **Price per UoM** and **Volume from** are set for a diluted product.
- If you set '100%', it means the **Price per UoM** and **Volume from** are set for a pure product.

▼ Details

Price per UoM	EUR 12,00	Ship to	
Unit of Measure	Sh. T	Incoterm®2010	
Currency	EUR	Location	
Cost per UoM		Lead time	
Volume from	55 555,00	Comments / Shipping Conditions	
Volume to		taxe percent	
		Price All taxes incl.	

▼ Product Concentration Details

Concentration (%)	30,00 %	Price for 100% concentration	EUR 12,00
Pricing method (%)	100,00 %	Volume for 100% concentration	55 555,00

The user fills the price and the volume for each product included in the quote.

Let's have a closed look to pure /diluted quotation process:

▼ Details			
Price per UoM	EUR 12,00	Ship to	
Unit of Measure	Sh. T	Incoterm®2010	
Currency	EUR	Location	
Cost per UoM		Lead time	
Volume from	55 555,00	Comments / Shipping Conditions	
Volume to		taxe percent	
		Price All taxes incl.	

▼ Product Concentration Details			
Concentration (%)	30,00 %	Price for 100% concentration	EUR 12,00
Pricing method (%)	100,00 %	Volume for 100% concentration	55 555,00

- "Volume for 100% Concentration" (read only): is updated with **Volume From** and **Pricing method**.
- "Price for 100% Concentration" (read only): is updated with **Price per UoM** and **Pricing method**.

The user has a growth business opportunity on an existing product and his customer has asked him to send him a commercial offer to finalize the negotiation. The user prepares his quote.

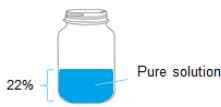
Let's take an example:

Let's take an example:

▼ Details			
Price per UoM	EUR 1 000,00	Ship to	
Unit of Measure	T	Incoterm®2010	
Currency	EUR	Location	
Cost per UoM		Lead time	
Volume from	410,00	Comments / Shipping Conditions	

▼ Product Concentration Details			
Concentration (%)	22,00 %	Price for 100% concentration	EUR 4 545,45
Pricing method (%)	22,00 %	Volume for 100% concentration	90,20

Product



- If we set « Pricing method » = 22%, that means that '**Price per UoM**' and '**Volume From**' correspond to diluted product (product as such):



- If we set « Pricing method » = 100%, that means that '**Price per UoM**' and '**Volume From**' correspond to pure product (Reporting Unit product):



The user fills the prices and the volume for each product included in the quote.

The user updates price and volume and click on save. The quote is ready.

▼ Details

Price per UoM	EUR 12,00	Ship to	
Unit of Measure	Sh. T	Incoterm®2010	
Currency	EUR	Location	
Cost per UoM		Lead time	
Volume from	55 555,00	Comments / Shipping Conditions	
Volume to		taxe percent	
		Price All taxes incl.	

▼ Informations

Freight cost	Freight cost info.
Rebate (%)	Rebate info.
Specific discount (%)	Specific discount info.

▼ Product Concentration Details

Concentration (%)	30,00 %	Price for 100% concentration	EUR 12,00
Pricing method (%)	100,00 %	Volume for 100% concentration	55 555,00

Payment terms automati on:

Payment terms can be managed at the quote header OR at the quote line item level.

Quote Detail

▼ Pricing information

Incoterm®2010
Location
Payment terms 30 Days
Specific Payment Term
Extra Charges
Extra Charges info
Price per quarter
Invoice periodicity No periodicity
Specific Invoice Periodicity

Quote Line Item Detail

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	☒

- If a payment term is set at the quote header level, payment terms of the line items will be set this value.
- If a payment term is set on the header, and the user set a different payment term on a line item, the header payment term will be set to 'no value'.
- If a user update the header payment value from 'no value' to a value, all line items payment terms will be updated to this value, even if they had a another value.

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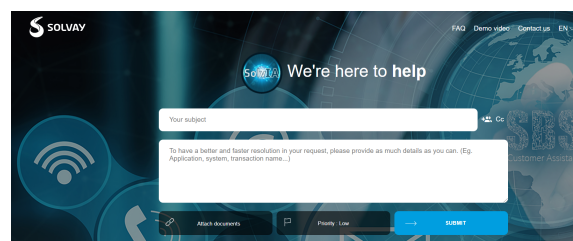
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you can copy users with email address , default priority is Low , then Submit . We advise you to put keywords in subject to ease dispatching to correct Agent : CRM - Complaint for example