

# FD - P8. Quote Management

- 1. Functional Process
  - Process Overview
  - Use cases
  - Flow
- 2. Data Model & security
  - Main objects
  - Quote security model
  - Quote security model: Shared
  - Quote security model: GBU Restricted
  - Quote security model: Confidential
- 3. Quote custom buttons and features
  - Quote buttons
    - "Generate PDF" button
    - "Send Last Version" button
    - "Generate Contract" button
  - Quote line items buttons
    - "Mass clone" button
- 4. Specific rules & automation
  - Quote generated from an opportunity
  - Field History Related List on quote
  - Approval process
  - Status "Accepted"
  - Reminder
  - Feature implemented for Peroxides GBU only
- 5. History
- 6. Lightning
  - Components
    - Warning component:
    - Quote Team:
    - PDF:
- Enhancements

Change Log	Date	Owner
PRA interface for Peroxides <a href="#">CCCME-8532</a> - Getting issue details... STATUS	06 Nov 2024	MILIC-ext, Nikola
RPA change of subjects <a href="#">CCCME-9343</a> - Getting issue details... STATUS	13 Jan 2025	MILIC-ext, Nikola



## NEW / Next release

R-2314 / Change about massa risus, vestibulum in nunc vitae, sagittis dignissim est.

## 1. Functional Process

### Process Overview

Quotes are an extremely **important part of the sales cycle**. Not only are quotes the blueprint for the contract, but they are often the first impression we leave on our customer.

Quotes give us an opportunity to make a strong brand impression, and demonstrate our commitment to the customer. Quotes can move our deals forward by:

- Making a positive first impression (accurate and professional document within their time frame)!
- Giving you the first mover advantage (whoever delivers the quote first often gains the advantage in the negotiation process)
- Setting the starting point for negotiation
- Getting the customer to commit

*Note:* there is no link with SAP; the CSR will have to manually create an order in SAP.

### Use cases

- Create a Quote from a Growth business Opportunity or directly from an account
- Add a product or modify an actual product
- Enter Product details (price, volume,...)
- As submitter, submit the Request for approval to the approver if the approval is necessary
- As approver: accept, reject or reassign the request for approval of the Quote.
- Communicate with the PDF generation and Attach other documents to the Quote

- Manage versioning
- Manage visibility and permissions
- Mass update line items / Mass clone line items
- Follow the customer validation

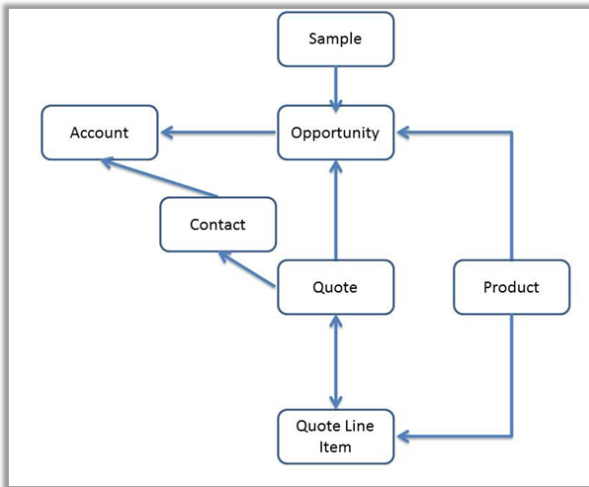
Flow



- A new customer asks for a Quote on an existing product -> **Growth business**
- A new customer asks for a product to be developed -> **Growth business**
- An existing customer asks for Product to be developed -> **Growth business**
- An existing customer asks for an existing product (Contract renewal) -> **Recurrent business**

## 2. Data Model & security

### Main objects



1. **Quote object** is centralizing the information of the quote.
2. **Quote line item** contains details of products (price, volum, incoterm, ship to)

### Related Objects

- **Contracts**: allow to see contract generated from the quote
- **Open Activities**: allow to log activities (task, event).
- **Activity history**: display all activities
- **Quote history**: display all fields updates
- **Approval History**: track all approval steps
- **Google Docs, Notes & Attachments**: allow to attach document to the opportunity.

## Quote security model

When the Salesreps creates a Quote, he will add a CSR on the field provided. The CSR will have a **Read Only access to the Quote**. It is possible to manually share a Quote to any colleagues with the “Sharing” button (only for the owner and the Manager in the role hierarchy). With the manual sharing, the owner can chose between two types of access: Read only or Read / Write.

The visibility field will define the visibility of the Quote as it is done in the Opportunity. The values of this field will be:

Value of the Visibility field	Definition
<b>Shared</b>	Shared (Read only) with all users except region restricted users
<b>GBU restricted</b>	Restricted to GBU users (Read only)
<b>Confidential</b>	Restricted to manual sharing users.

### Quote security model: Shared

	Quote owner+ backup+ hierarchy	GBU data steward	Opportunity Team Member with Read access	Opportunity Team Member with Read/Write access	C SR	All others users
View a Quote						
Create a Quote			x		x	x
Submit an approval for a Quote			x	x	x	x
Edit a Quote			x	x	x	x
Share a Quote	*(not possible for the backup)		x	x	x	x
Delete a Quote	*(not possible for the backup) only possible for Draft status		x	x	x	x
Send a Quote			x	x	x	x

### Quote security model: GBU Restricted

	Quote owner+ backup+ hierarchy	GBU data steward	Opportunity Team Member with Read access	Opportunity Team Member with Read/Write access	C SR	All others users of the GBU	All others users of others GBU
View a Quote							x
Create a Quote			x		x	x	x
Submit an approval for a Quote			x	x	x	x	x
Edit a Quote			x	x	x	x	x
Share a Quote	*(not possible for the backup)		x	x	x	x	x
Delete a Quote	*(not possible for the backup) only possible for Draft status		x	x	x	x	x
Send a Quote			x	x	x	x	x

### Quote security model: Confidential

	Quote owner+ backup+ hierarchy	GBU data steward	Opportunity Team Member with Read access	Opportunity Team Member with Read /Write access	C SR
View a Quote			x	x	
Create a Quote			x		x
Submit an approval for a Quote			x	x	x
Edit a Quote			x	x	x
Share a Quote	*(not possible for the backup)		x	x	x

Delete a Quote	*(not possible for the backup) only possible for Draft status		x	x	x
Send a Quote			x	x	x

### 3. Quote custom buttons and features

#### Quote buttons

##### "Generate PDF" button

Allow the users to generate a PDF resuming all information of quote and quote line items.

- The language of the PDF is determined by the field "Template Language" on quote. The PDF is available in 16 languages.
- The PDF format is determined by the field "Template". There are 3 types of format: Tabular, Detailed, Tabular landscape. Note that if a field is not filled in the quote, the corresponding column in the PDF will not be displayed.

When the PDF is generated, a button "Save as attachment" allows to attach the PDF in the Note & attachment related list of the quote. The button "Save & send" allow to send the PDF directly to the customer:

- The CSR is automatically added as CC
- The owner of the quote is automatically added as BCC
- The email template is generic and displayed in English only.

##### "Send Last Version" button

This button redirects the user on the page to send the last PDF generated to the customer.

##### "Generate Contract" button

This button allows to generate a contract pre-filling the fields using information of the quote.

#### Quote line items buttons

##### "Mass clone" button

This button allows to mass clone and edit several lines of quote line item:

- Step1: Chose how many line you want to add and click on Display Clones
- Step2: Edit the lines and Save

Note that it's impossible to add identical lines, or identical with the source quote line item.

##### Quote line items and template

- If you have the same product twice in the quote line item it will appear in the pdf in one section.
- An error message appear if you generate a pdf whiteout any quote line items.

### 4. Specific rules & automation

#### Quote generated from an opportunity

When a quote is created from an opportunity some fields are pre-filled with the information of the opportunity:

- Opportunity Opportunity name
- Visibility Opportunity visibility
- GBU Opportunity GBU
- BU Opportunity BU
- Currency currency
- Account Sold To Opportunity account
- Primary contact Opportunity contact
- CSR Opportunity Team CSR

Quote line items are also created with the information of opportunity products:

- Volume from Opportunity product Expected yearly volume
- Price per UoM Opportunity product Target Unit price per UoM
- Unit of Measure Opportunity product UoM
- Pricing method Opportunity product Pricing

For the fields :

- Incoterm
- payment terms
- specific payment terms
- location
- ship to

A rule ensure the consistency bewteen quote and line items. The values cannot be different on quote and line item: if a line item has a value different from the quote, the field of the quote is reset.

## Field History Related List on quote

Fields tracked are:

- Account
- CSR
- GBU
- Opportunity
- Price Validity From
- Price Validity to
- Primary Contact
- Status
- Template Language
- Visibility
- Volume validity from
- Volume validity to

## Approval process

The approval process is optional. If the user wants to submit the record for approval he will have to manually fill his approver and click on "Send to next approver".

## Status "Accepted"

To set status "Accepted" on the quote, at least one quote line item must have the checkbox "Include in Reporting / Accepted" ticked.

## Reminder

Users can set a reminder using the field "Expiration Notice". They can select a number of days to create automatically a task assigned to them x days before the date defined in the field "Price Validity To".

## Feature implemented for Peroxides GBU only


### Automatically attach 2 certificates to new quotes.

Every time a new Peroxides quote is created, the system adds the two files below into the quote attachments.

Explosive Precursor Certificate


[End-Use Certificate\\_template](#)

**QUOTES VERSIONS** + Generate new PDF + Generate New PDF on Selected Products

FILE NAME	CREATION DATE	
End-Use Certificate_Template.docx	2021-10-12	✉
 Explosive precursor certificate.pdf	2021-10-26	✉

When the quote is sent by email to the customer, the two files appear automatically to be sent to the customer. The sales manager could exclude these files if needed.

### Attach Files

	FILE NAME	CREATION DATE	
<input checked="" type="checkbox"/>	End-Use Certificate_Template.docx	2021-10-12	👁
<input checked="" type="checkbox"/>	End-Use Certificate_Template.docx	2021-10-12	👁
<input checked="" type="checkbox"/>	End-Use Certificate_Template.docx	2021-10-12	👁
<input type="checkbox"/>	 Explosive precursor certificate.pdf	2021-10-26	👁

Attach

 Upload Files

Cancel

These two files contain information that the customer should acknowledge about the products (dangerous goods). One of them must be signed and returned back to us as acknowledged.

### How to update the files?

To upload a new version of them, the steps to follow are:

- very important** - Do not change the file name, otherwise the system will not find the file to upload automatically into the quote

File **End-Use Certificate\_Template**

Size: 188KB | File Extension: docx | Owner: Susana Alves

Preview **Details**

Information

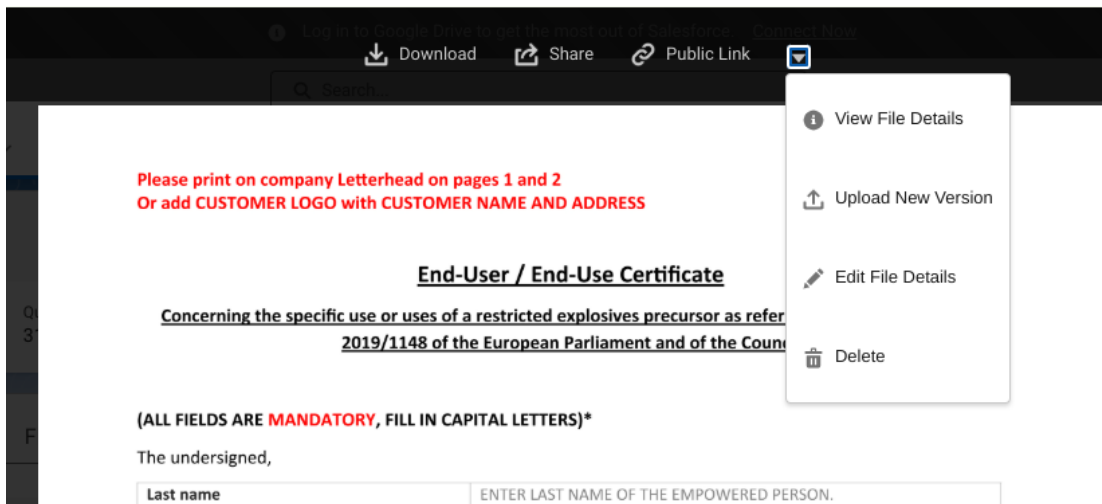
Title: End-Use Certificate\_Template

Description:

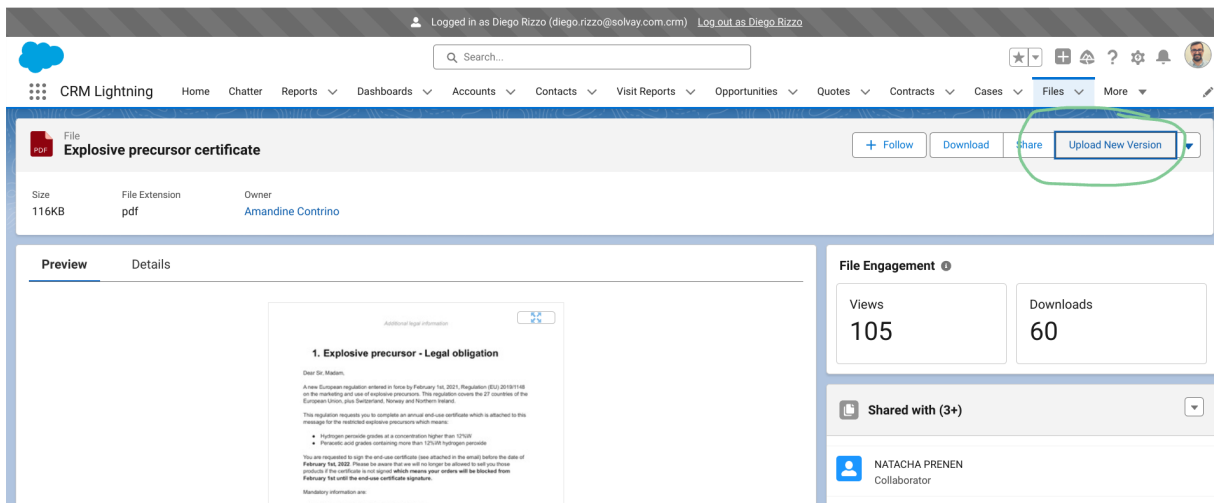
Created Date: 19/02/2025 16:21

Last Modified Date: 19/02/2025 16:21

- in the quote, click on the file
- a preview is shown, open the arrow and click on "View File Details"



- the file page is open and click on “Upload New Version” button



## 5. History

Until release Spring17, all quotes must be generated from opportunities. Now it's possible to create quote directly from an account or from scratch to manage recurrent business.

## 6. Lightning

### Components

#### Warning component:

A warning component on quote which display a warning:

- If there is no quote line item
- If the quote status is “sent” and the “quote validity date” is expired
- Last activity date: most recent dates of “quote last update”, or “quote line item last update”.
- For quote validity date, price validity date, volume validity date:
  - If it is past: show an alert with the number of expired days
  - If it is in the future: show the number of remaining days

#### Quote Team:

The component replace the related list. It displays quote team members and allow to manage the team (add, edit remove members).

## PDF:

All the PDF action are handle with this component. There is a button to generate a new version of the PDF: once generated, the user can save it or save & send it. The component allows to view all PDF already generated, and to see which one hase been sent (arrow icon) and the sent date (hover on the arrow).

In the "send" flow, it is now possible to select the files to put in attachment of the email.

# Enhancements

<https://solvayagile.atlassian.net/browse/CCCME-8532>

**Overview:** The "Quotes" functionality for Peroxides GBU automates the process of transferring accepted quotes from the CRM system to SAP through RPA integration. This functionality is essential for ensuring that all relevant quote data is accurately captured and efficiently imported into SAP without manual intervention, improving data accuracy and operational efficiency for Customer Service Representatives (CSRs).

## Key Components:

### 1. Accepted Quotes:

- Only quotes with the status of "Accepted" are eligible for automated processing.
- Quotes are filtered based on specific criteria:
  - GBU: Peroxides
  - Region: EMEA

### 2. File Generation:

- The system generates an Excel file containing all accepted quotes for the day.
- The file includes necessary fields as specified by the RPA and CSR teams to meet SAP requirements.
- **File name format:**
  - For Peroxides: Quote line items for PF1 - Peroxides - <date>.xls

### 3. Automated Email Notification:

- Once the file is generated, it is automatically emailed to the designated RPA email address (e.g., [RPA-ROBOT-FARM-PROD@solvay.com](mailto:RPA-ROBOT-FARM-PROD@solvay.com)).
- **Updated Email Subject Lines:**
  - Peroxides: "Peroxides - H2O2.EMEA.XX.003 Accepted Quotes"
  - Soda Ash: "Soda Ash - SAD.EMEA.XX.004 Accepted Quotes"

This update resolves the issue of conflicting subject lines by providing distinct identifiers for each GBU.

## Last modifications :

User	Last Update
<a href="#">Julien Andreoli-ext</a>	2966 days ago
<a href="#">MILIC-ext, Nikola</a>	484 days ago
<a href="#">Alves, Susana</a>	446 days ago
<a href="#">Leila Radjah</a>	2734 days ago
<a href="#">BRAHIM, Walid</a>	
<a href="#">KANJA-ext, Zakaria</a>	
<a href="#">NWANGWU, Daniel</a>	