

# IPP-313 - Create Quote - Default field values, Validation Rules and Automations

## 1/ Default field values or automation for new "ONE Sales Quote" Quote Record type

Field label	Default value or automation
Quote Title	SQ_[SLV2_quote_Account__c.Name]/[Today Date]/[Auto Number : 000001]  <i>If not possible configure by default "This field (Quote Title) will be filled automatically" and update it with an automation after creation.</i>
Status	Default value : "Draft"
GBU	Novecare
Quote expiring by	Today + 7 days
Quote valid to (External)	If blank after creation populate same value as "Quote valid to (Internal only)" (SLV2_quote_Price_Validity_to__c)
Pricing Currency	By default currency of the running user
Account customer Segment	Retrieve Account.SLV_Involved_GBU__c.GBU_Account_Type__c WHERE Account.SLV_Involved_GBU__c.SLV7_GCS_GBU__c = Quote.GBU__c  If record does not exist : "Customer segment not defined for GBU"  Update that field twice :  1/ At quote creation  2/ When the quote will be sent for approval (the quote status will be updated from Draft to Sent for approval)

## 2/ Validation Rules to create :

*These VR has been pasted from iCare. Please adapt them with the Novecare fields and Record type "ONE Sales Quote"*

- "The Deviated payment term and the Standard payment term must be different." :

```
IF($Permission.Bypass_Validation_Rules, FALSE,
AND(
TEXT(Deviated_Payment_Terms__c) = TEXT(Standard_Payment_Terms__c), Record_Type_Developer_Name__c = 'ONE Sales Quote',
&& NOT(ISPICKVAL(StageName, 'Closed - Sales Started'))
)
)
```

- "You can only update the status to "Sent to customer" or "SAP upload preparation" if quote has been approved"

```
NOT($Permission.Bypass_Validation_Rules) &&
NOT(Bypass_Validation_Rules__c) &&
ISCHANGED(StageName) &&
NOT(
OR(
ISPICKVAL(StageName, 'Sent to Customer') && ISPICKVAL(PRIORVALUE(StageName), 'Approved'),
ISPICKVAL(StageName, 'SAP upload preparation') && ISPICKVAL(PRIORVALUE(StageName), 'Approved', 'Sent to Customer'),
)
) &&
Record_Type_Developer_Name__c == 'ONE Sales Quote'
```

- "The Stage for new Sales Quotes must be 'Draft'." :

**NOT(\$Permission.Bypass\_Validation\_Rules) &&  
NOT(Bypass\_Validation\_Rules\_\_c) &&  
ISNEW() &&  
NOT(ISPICKVAL(StageName, 'Draft')) &&  
Record\_Type\_Developer\_Name\_\_c == 'ONE Sales Quote'**

- "You are not allowed to select manually the stage "Closed - Sales Started" :

**To be reviewed with dev**

- Contact\_\_c has to be related to the Account or the account Corporate group (Account.ParentId) of the quote. Error message : "Please select a contact related to the account or linked to the account through the Corporate Group." **Adapt iCare rule for Core.**
- If Status = "Closed Sales Started" or "Quote expired" all quote fields should be in read only. Error Message : You can't edit a quote "Closed Sales Started" or "Quote Expired" ==> **Investigate Dynamic forms (for technical teams)**
- Quote valid to (External) has to be <= than "Quote valid to (internal only)"
- "Payment terms rationale" is Mandatory if "Payment terms" is not blank
- "Quote valid to (Internal)" needs to be greater than "Quote valid from (Internal)"
- ~~Block quote creation If account\_\_r.SLV\_SAP\_Status\_\_c is "Prospect" OR "Rejected" OR "Draft". Error message : "The Account Status needs to be Creation Request, Validated, Update Requested or Creation Requested in order to create a quote"~~
- For "Account (Sold to)" Accept only SAP accounts (If record type = "SAP Customer" AND Partner type= "Ship to"
  - Error message : "The Account (Sold to) needs to be in SAP in order to create a quote and not identified as "Ship to" only."
- Block creation of the quote if the account record type is Corporate Group. Error message : You can't create a quote for a Corporate Group.