

FD - [CORE] 1 - Create Quote From Account, One Quote, CPCs - Payment terms&Rebates

- 1/ Create Quote From the Account Page
- Rebates
- Multiple Sold To

An Account Manager will start the process of creatin a quote from mutlpe ways :

- 1 /From scratch :
 - From the Account Page
 - From the One Quote Page
- From exisiting data
 - From CPCs ==> [FD - \[CORE\] Pricing Campaign - Request creation of a quote](#)
 - From existing quote - Clone ==> [FD - \[CORE\] 2 - Extend / Renew / Clone One Quotes](#)
 - From existing quote - Renew ==> [FD - \[CORE\] 2 - Extend / Renew / Clone One Quotes](#)
- Payment terms

The Account Manager must have the "One Sales Quote" Permission in order to create the quote

1/ Create Quote From the Account Page

On the Account page a click on "New One Quote" (1) and fill all data (2)

(1) "New One Quote" button is always displayed

(2) Fill Data, some field will be automatically prepopulated or have specific features

On the One Quote List view click on "New" (3)

The same creation page is used with the following criterion

- Quote Title:
 - Can be set by user,
 - If left blank will be automatically populated with: 'SQ_' & SLV44_Account_Sold To_r.Name & '/' & TEXT(DATEVALUE(CreatedDate)) & '/' & Name

The image displays two screenshots of the 'New One Quote' form in a CRM system. The top screenshot shows the form with a red arrow pointing to the 'New One Quote' button in the top right corner. The bottom screenshot shows the same form with a red arrow pointing to the 'New' button in the top right corner of the list view.

The form is titled 'New One Quote' and contains several sections for data entry:

- Information:** Includes fields for 'Quote Title', 'Owner', 'Account Head No.', 'Reference', 'FBI', 'Agent', 'Legal entity', and 'Company'.
- Localization and Currency information:** Includes fields for 'Region', 'Search Accounts', 'Currency', 'Delivery Location', 'Incoterms', and 'Unit of Measurement'.
- Quote dates & timelines:** Includes fields for 'Quote valid to', 'Price valid to', and 'Quote start date'.
- System information:** Includes a 'Revised From' field.

The form also includes a 'Cancel' button and a 'Save' button at the bottom right.



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- GBU :
 - PreFilled with the current user.GBU
- BU
 - PreFilled with the current user.BU
- Account (Sold To)
 - PreFilled with the Account the user were in. (if from Account)
 - *Validation Rule : You can't create a quote for a Corporate Group.*
 - *Validation Rule: You cannot create a quote from an account that is marked for deletion in SAP*
- Contact Name
 - The user can select only contact from the Account Sold To or its Parent.
 - If Account Sold To Parent. Name = Decision Various then Only Contact from the Account Sold To are displayed
 - *Validation Rule : Please select a contact related to the*

account or linked to the account through the Corporate Group.

- Region
 - PreFilled with the current user.Region
- Currency
 - PreFilled with the current user.Currency
- Incoterms
 - Default Value is CIP
- Unit of Measurement :
 - set by default to Account.Unit of measurement if the quote is created from an account
 - Quote Unit of Measurement
 - IF (NO T (IS PIC KV AL (SL V_ Reg ion_ _c, 'NA M')) , 'Kg', 'Lb')
- Price Valid From
 - prefilled with : Today +7 days
- Price Valid To
 - prefilled with : Grace period Default Value
 - *Validation Rule : Price Validity must not exceed Max External Validity*
 - *It also applies for Renew & Cloning quote*
 - Grace period settings [FD - \[CORE\] Grace Period](#)



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- Offer Expiring By
- Legal Entity :
 - Legal entity is mandatory if GBU of the One Quote is different than Novecare
 - If GBU Novecare & not filled by the user it is autopuluted at insert with the

following rule



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- IF the **Legal Entity** field is **BLANK**, prepopulate the field following these conditions:
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 - If GBU is TS the field must be filled at Quote Creation
- Contract linkage
 - The account manager can check the box "Link to Existing Contract" then it display a popup to link a contract with the following criteria tht are applied only at Draft status :
 - Contract status = Active
 - AND (Quote Account = Contract Account
 - OR Quote Account : corporate Group = Contract Account
 - OR Quote Account = Contract Sold To Account)



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Rebates

Account Managers can enter a Rebate in the quote when the status is Draft. The Rebate section is just a text field where the user can enter all details related to the Rebate.

In addition the Account manager has field : Rebate URL, that can be used to store the link to the rebate file that need to be loaded in SAP.

If an AM enters a Rebate, the approver will see a banner on the top of the quote so that they review it before approving or rejecting the price.



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The screenshot shows the CRM Lightning interface for a quote titled "Rebate Test 2". The quote is in the "Draft" status. The "Configuration & Products" section is expanded, showing a table of products. The first product is "Product 1" with a price of 30,000. The "Rebate" section is visible at the bottom of the product list, showing a rebate amount of 5,000.

Product	Unit Price	Quantity	Total Price
Product 1	30,000	1	30,000
Rebate	-5,000	1	-5,000

The screenshot shows the "Update Rebate on quote 042257" dialog. The dialog has a "Rebate" section with fields for "Rebate Information from Quote" and "Rebate Details". The "Rebate Details" section shows the rebate amount of 5,000. The "Rebate" section also includes a "Rebate URL" field.

Field	Value
Rebate Amount	5,000
Rebate URL	



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FD - [CORE] 7.2 - CSR Tasks : Update Rebate

When the a quote containing a Rebate
is moved to "SAP Upload Preparation"
the system creates a task for the CSR
that contains the Rebate Details.

- RT : "Upload Rebate"
- Dut date is set to + 7 business
days
- Subject = "Upload Rebate on
quote : 042130"
- Related to the quote
- Owner = "Rebate Upload
Queue"



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The CSR managing this "upload rebate" tasks is responsible for uploading this rebate to SAP. It's a manual activity for which several CSR around the globe are trained.

Removed

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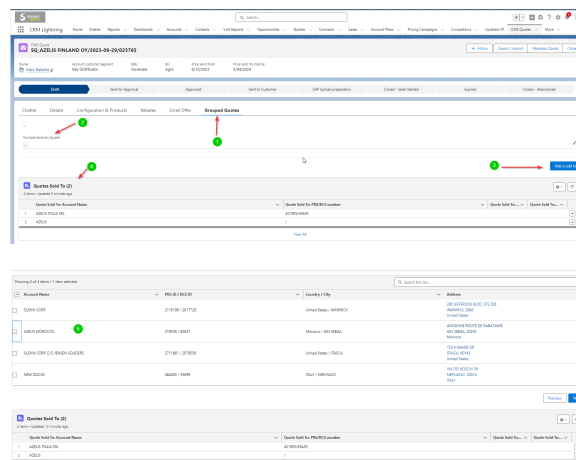
~~Once the Rebate is in SAP, they update the Rebate Acknowledgement to "Acknowledge and updated in SAP". Then they can close the task.~~

SF - Novocare - Data push to SAP

Multiple Sold To

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For Account Manager that manage same price for multiple Sold to they can manage it through the "Grouped Quote" tab (1) that is available at Draft Status.



The account manager can tick the box : "Multiple Sold-to's Quote?" (2).

Once it is checked the account manager :

- Can not anymore Mass Edit the quote
- Can not update OQLI Ship to
- Can not clone quote line
- Can link a new sold to (3) & (5) with the following criterions
 - all Account with the same "Quote. Account. Corporate group" + Partner type = "Ship To" or "Sold-to & Ship-to" + Do not show the Quote Account
 - and not already in the linked to the quote

- Account Sub partner type = "Sold to & Ship to"

The list of quote sold to is display at the bottom of the page. (4)

Once que quote is not at DRAFT Status, the Account Manager can not EDIT / DELETE Quote Sold to list. The "Add a sold to" button is hidden

When the user access the Configuration & Product an additional note identify that it is a grouped quote (1)



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Ship To	Instance	Subpartner	Subpartner name	UOM	Quantity	Unit	Unit Sold Price	Quantity price	CM2	Status	Action
SHIP TO: 1000 1000 1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	DRAFT	