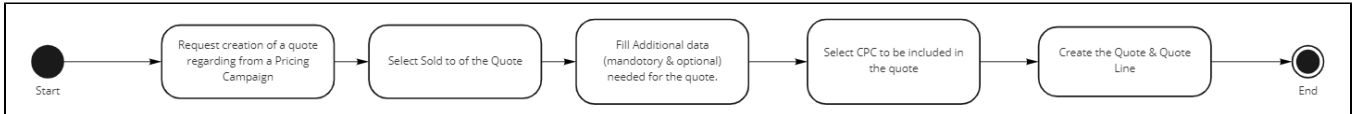


FD - [CORE] Pricing Campaign - Request creation of a quote

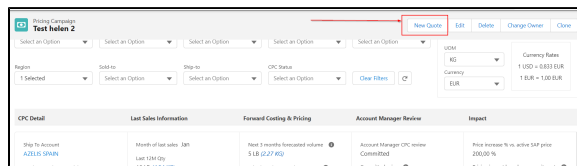
- The quote creation process from a CPC
- 1/ Request creation of a quote regarding from a Pricing Campaign
- 2/ Select Sold to of the Quote
- 3/ Fill Additional data needed for the quote.
- 4 / Select CPC to be included in the quote
- 5/ Optional - Add Active quote line items in the quote
- 6/ Create the Quote & Quote Line
- 7/ Error Management

The quote creation process from a CPC

This process will be done by the Key Account manager once he has committed its CPC.



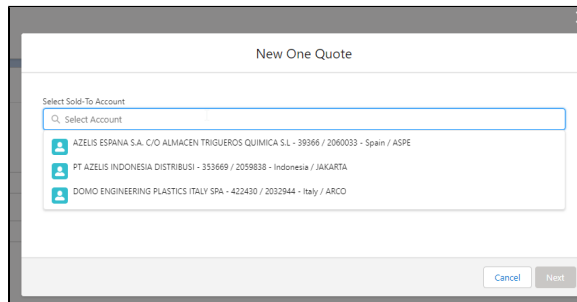
1/ Request creation of a quote regarding from a Pricing Campaign



In the Pricing campaign a user can click on the button "Create Quote" in order to start the process.

2/ Select Sold to of the Quote

The Key Account Manager have a first screen in order to specify which sold to he want to create a quote one.




In order to help the user to choose the correct Sold To, we display Account Name + RCS/PRS ID + Country / City

Once selected he can click on Next


Rule :

Only Sold To from the pricing campaign can be selectable.

Only the Sold to of the CPC Owned by the current user can be selectable.

 Unable to locate Jira server for this macro. It may be due to Application Link configuration.

From UX perspective, if more that 5 records we display a drop down bar.

 Unable to locate Jira server for this macro. It may be due to Application Link configuration.

3/ Fill Additional data needed for the quote.

A form is displayed in order for the Key Account Manager to specify all information related to its quote.

Most of the field will be prepopulated in order to help him on the quote creation.

- GBU
 - Preselected with User GBU
- BU
 - Preselected with User BU
- Pricing region :
 - Preselected with User Pricing region

Few empty fields are **Mandatory** and need to be manually added by the Key Account Manager :

1. Currency : This will be the currency of the quote to be created. All EUR/USD committed price will be converted into that specific currency base on the Salesforce Active exchange rate.
 - a. The Currency selected on the pricing campaign page will be autopopulated here.
2. Unit of Measure : This will be the Unit of measure of the Quote. All KG / LB quantity will be converted to the selected currency.
 - a. The Currency selected on the pricing campaign page will be autopopulated here.
3. Contact Name
 - a. Only Contact related to the sold to account or linked to the account through the Corporate Group.

- b. In order to help the user to choose we display contact name + Account Name in the search box.
- 4. Contractual Commitment is set by default to "Soft Quote"
- 5. Dates :
 - a. Date will be prefilled with Pricing campaign date. Some rule will be applied :
 - i. Price Valid From
 - 1. Prefilled with Campaign Price Valid From
 - ii. Price Valid To
 - 1. Prefilled with Campaign Price Valid To
 - iii. Offer Expiring by
 - 1. Prefilled with Campaign Price Valid From plus 5 days
 - iv. Price valid to rules
 - 1. For Nov eca re :
 - a. can't be more than 4 months than Price Valid from
 - 2. For TS :
 - a. can't be more than 12 months than Price Valid from

We also have identified **Optional** field that the Key Account Manager can set :

- 1. Delivery location
- 2. Reference Contract
- 3. Ship To : Only Ship to from the Sold to can be selected here.

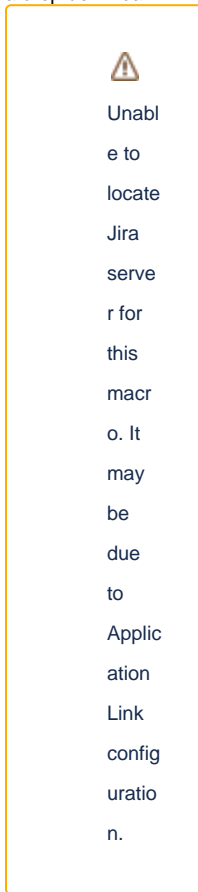
- a. All Account that have the Sold To account as Parent Account
- b. We display as Hover the full name of the the ship to :



Unabl
e to
locate
Jira
serve
r for
this
macr
o. It
may
be
due
to
Applic
ation
Link
config
uratio
n.

- c. If more that 5 are available we display

a drop down bar :



Once all infos are set the user can go to next page.

4 / Select CPC to be included in the quote

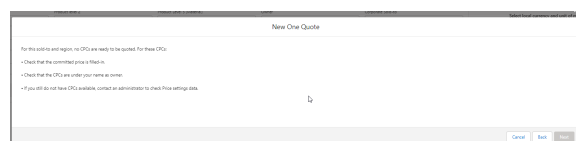
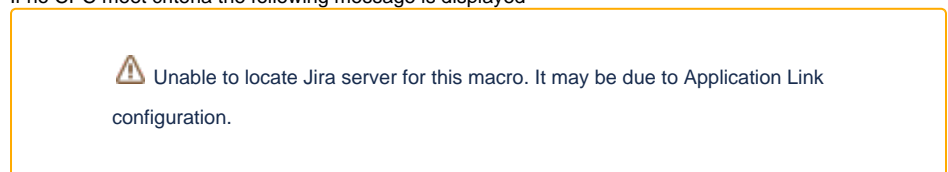
The Key Account manager can select from the list all CPC that he wants to include in the quote.

Product Lev...	Ship To Acc...	Committed ...	Original Cu...	Original UOM	Account M...	
<input checked="" type="checkbox"/>	RHODATERGE O...	AZELIS SPAIN	3	USD	LB	Committed
<input type="checkbox"/>	RHODASURF PE...	AZELIS SPAIN	1	EUR	KG	Rejected

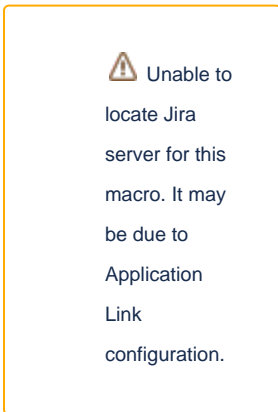
What CPC are displayed on the list :

- Only CPC from the Pricing campaign initially selected
- The committed price of the CPC need to be set
 - Committed Price > 0
- Only CPC from the Sold To
- If a Ship To selected, only CPC from the Ship To
- The product of the CPC need to be Active
 - Field "Active" on Product Level 5
- The product of the CPC need to be Quotable
 - Field "Allow On Quote" on Product Level 5

If no CPC meet criteria the following message is displayed



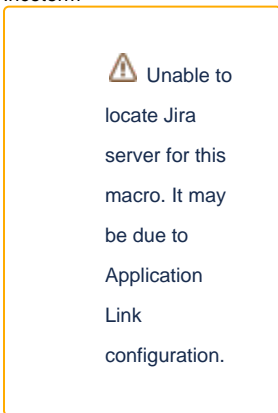
- ~~Shipping Plant (Material SKU), Manufacturing plant (Material SKU), Region & Market pricing (based on Product level 4) & Volume Bracket need to be created in Salesforce in order to be able to select the CPC.~~
- CPC.Price Setting = TRUE



- CPC Owner = Currenty User

The user can see on the list the following information :

- Material Name
- Ship To location
- Incoterm



- Committed Price
- Original Currency
- Original UOM

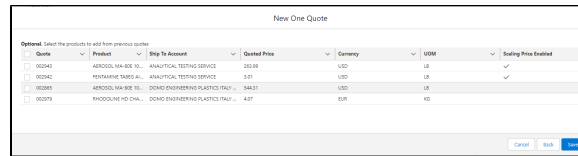
The user can only see the committed Currency & Unit of Measure from the CPC. It will be automatically converted to the selected Currency and Unit of Measure at creation.

The user can click on Next once some CPC have been selected.

5/ Optional - Add Active quote line items in the quote

We let the user decide which Active quote line he wants to add in the quote.

This action is optional.

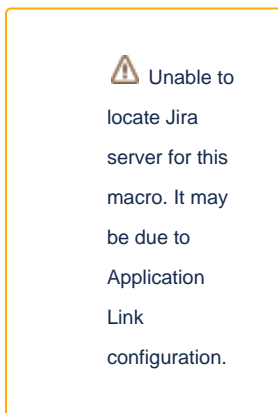


The screenshot shows a 'New One Quote' window with a table titled 'Optional: Select the products to add from previous quotes'. The table has columns for Quote, Product, Ship To, Amount, Quoted Price, Currency, USD, and Status. Three rows are visible, each with a checkmark in the Status column.

Quote	Product	Ship To	Amount	Quoted Price	Currency	USD	Status
002042	ARX000, MA-BDE TO...	ANALYTICAL TESTING SERVICE	251.89		USD	US	✓
002042	REPAIRING TABS AL...	ANALYTICAL TESTING SERVICE	3.81		USD	US	✓
002085	ARX000, MA-BDE TO...	CONV ENGINEERING PLASTICS TRAY	244.31		USD	US	✓
002079	ARX000, MA-BDE TO...	CONV ENGINEERING PLASTICS TRAY	4.87		USD	US	✓

It will display all Quote line items with the following criteria

- Quote Status = "Closed - Sales Started"
- Quote Sold To = Sold to of the new quote
- Quote pricing region = Pricing region of the new quote
- Quote BU = BU of the new quote
- Quote line key (Product Level 5 - Ship To) is not in the Pricing Campaign
- Quote Owner = logged in User
- Quote Line . Is Active = True
- OQLI .Price Setting Active = TRUE




These additional quote line will the field : "Created from CPC" to FALSE as they are not directly created from CPC.


The user can see on the list the following information :

- Quote Number
- Product Name
- Ship To location


- Shipt To City

 Unable to locate Jira server for this macro. It may be due to Application Link configuration.

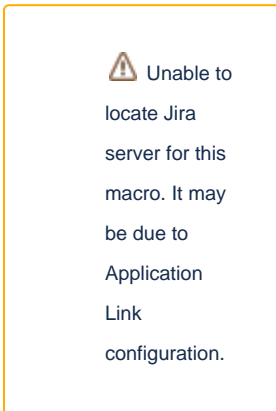
- Incoterm

 Unable to locate Jira server for this macro. It may be due to Application Link configuration.

- Quoted Price
- Currency
- UOM
- Price Valid From

 Unable to locate Jira server for this macro. It may be due to Application Link configuration.

- Price Valid To



- Scale Price Enabled

The process will copy following information as new quote line fields :

- SLV44_Product_Level_5__c
- SLV44_Ship_to_Account__c
- SLV44_Manufacturing_Plant__c,
- SLV47_Shipping_Plants__c,
- SLV44_Estimated_Annual_Volume__c,
- SLV44_Quoted_Price__c,
- SLV44_Product_Level_5__c,
- SLV44_SAP_Scale_quantity1__c,
- SLV44_SAP_Scale_quantity2__c,
- SLV44_SAP_Scale_quantity3__c,
- SLV44_SAP_Amount2__c,
- SLV44_SAP_Amount3__c,
- SLV47_Enable_Scaling_Price__c,
- SLV44_Contractual_commitment__c,
- SLV49_Minimum_order_quantity__c,
- SLV49_Lead_Time__c,
- SLV47_Special_customer_information__c
- SLV44_Rationale__c
- SLV44_Description__c

If an Active Quote Price (from step 5) creates a new quote line that is below Price Guidance, due to new Price Guidance then the rationale field is automatically set set : "Other, Please Describe".

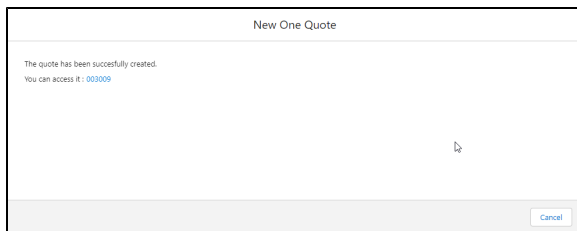
An additional Message is set on the Quote confirmation page :

"Some materials retrieved from the previously quote are below the new Price Guidance. Please check them in the new quote"

6/ Create the Quote & Quote Line

Based on the info the Key Account Manger Set and and CPC selected the Quote & Quote line is created

The user can see the Quote number from the Success page and also access it directly if needed.



At Quote level

Some fields on the quote will be set by default :

- Status = Draft
- Inoterms = FCA

Other fields will be retrived from the quote form the user filled

At Quote line level

Some master data field will be automatically mapped :

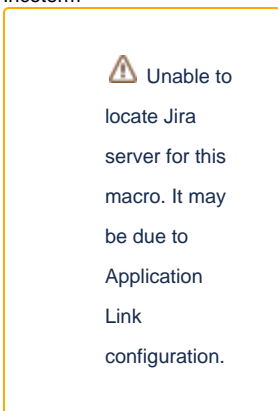
- Shippint plant
- Manufacturing plant
- Region & Market pricing
- Volume Bracket

Some field will be mapped from the Quote form :

- Contractual commitement

All other fields will come from the CPC :

- Ship To
- Sold To
- Incoterm



- Estimated Annual Volume = "Forecasted 12M Qty of the sold-to" of the CPC converted in the UOM of the Quote
- Quoted Price = CPC Committed price converted at quote currency with the active exchange rate

[CPC to Quote Mapping](#)

7/ Error Management

At any moment if there is an error in the process, NO quote neither quote line will be created.

An error message will display the error to the user.