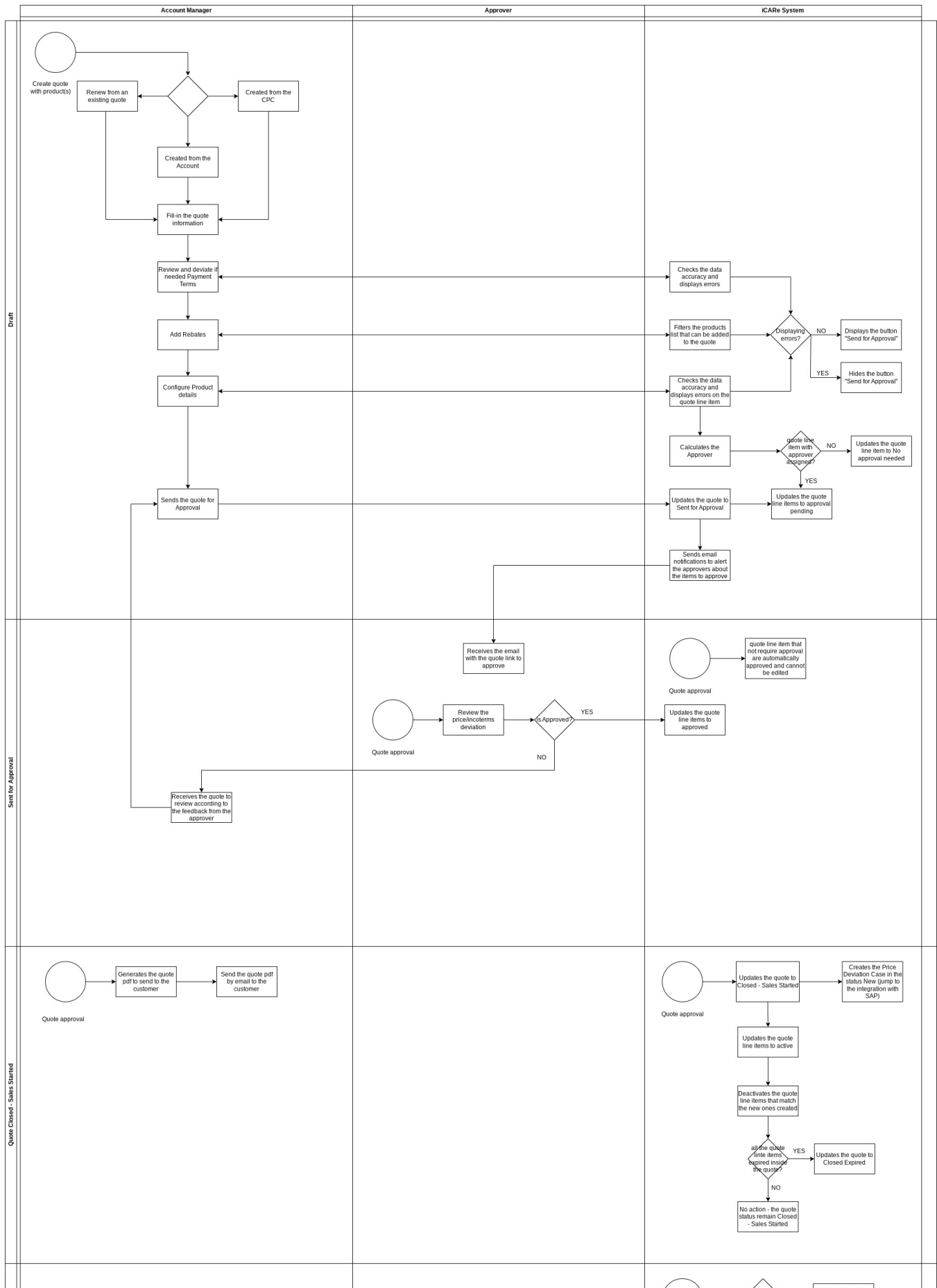
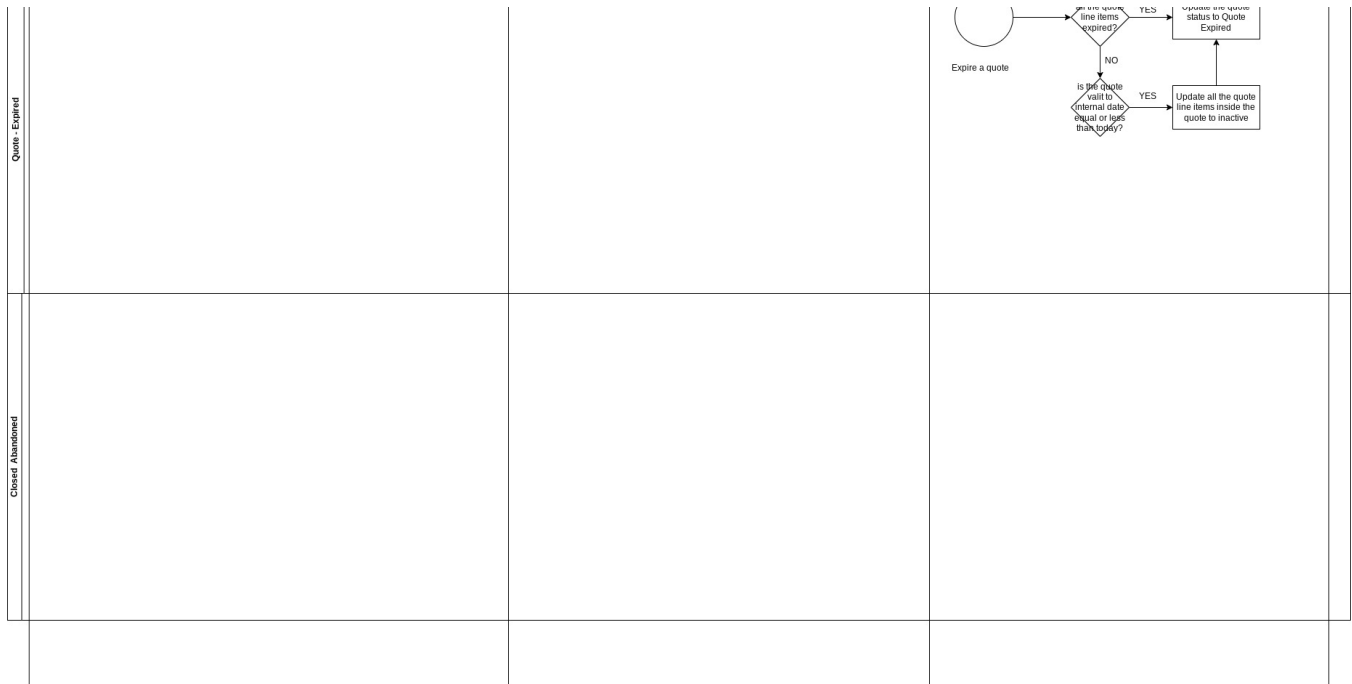


FD - [iCARE] Price Execution SPP

- Link to the diagram: <https://app.diagrams.net/#G16eEobBBJKYsb0qsKglaowv1XS-4hUgJl>
- Rules for the quote creation:
- Information to create a quote:
- Rules to determine the end use and market segment in the OLIs:
- Rules to determine the Pricing market in the OLIs:
- Rules to add products into a quote:
- Rules to add final consignee into the OLIs:
- Rule to determine Opportunity Market Cluster
- Rules to hide Send for Approval button:
- Rules to determine the quote line item approver when the price is deviated:
- Rules to determine the approver when the Incoterm is deviated in the quote line item:
- Rules to calculate the last quoted price:
 - Last quoted price is saved in the database when OLI is activated, but displayed only when the quote is closed sales started.
- Rules to deactivate quote line item:
- Rules to turn the quote into Closed - Expired:
- Error handling provided by the system in quotation:

Link to the diagram: <https://app.diagrams.net/#G16eEobBBJKYsb0qsKglaowv1XS-4hUgJl>





iCARE Quote creation and price calculation Epic Links:

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

Rules for the quote creation:

- Quote Valid To external date must be equal or lower than the Quote Valid To internal date
- Final Consignee is optional. If populated, the quote line items created inside the quote will have the same final consignee

Information to create a quote:

- Quote Valid From and Quote Valid To internal dates is the products that can be included inside the quote (the price of the product must be the same or beyond these two dates)
- Quote Valid To external date
- Region and Currency will drive the price selection for the products added to the quote

Rules to determine the end use and market segment in the OLIs:

On the end_use__c object, the system searches for the account in the quote and product(s) selected.

If there is an end_use__c record matching, the systems gets the market segment and end use values and automatically populate them in the OLI.

The system also displays the values in the screen below as read-only.

Market Segment Selection

Product	Pricing Region	Currency	Market Segment	End Use	Pricing Market
Tecnoflon SHP 86	Europe	EUR	AUTOMOTIVE (AUTO)	AUTO - O-RINGS, SEALS AND G...	Select Pricing Market

Cancel

Back

Add Product

If there is no end_use__c record matching the account and products, the system displays the fields as editable, so the account manager must select the values manually.

Market Segment Selection

Product	Pricing Region	Currency	Market Segment	End Use	Pricing Market	Forecasted Annual Volume	MOQ
PPS PR11	Europe	EUR	Select Market...	Select EndUse	BLANK		540.00
PPS PR25	Europe	EUR	Select Market...	Select EndUse	BLANK		540.00
GALDEN DET	Europe	EUR	Select Market...	Select EndUse	BLANK		100.00
GALDEN HS 235	Europe	EUR	Select Market...	Select EndUse	BLANK		1,000.00
Fomblin D2	Europe	EUR	Select Market...	Select EndUse	BLANK		40.00
FOMBLIN DA305	Europe	EUR	Select Market...	Select EndUse	BLANK		20.00
FOMBLIN DA 305 Fluorescent	Europe	EUR	Select Market...	Select EndUse	BLANK		5.00

Rules to determine the Pricing market in the OLI:

The pricing market is the pricing setting selected by the system, based on the Region and Currency in the quote.

The pricing market by default is the generic one (with the market segment empty), named BLANK.

Market Segment Selection

Product	Pricing Region	Currency	Market Segment	End Use	Pricing Market	Forecasted Annual Volume	MOQ
FLUOROLINK MD 700	China GCT	CNY	Select Market...	Select EndUse	BLANK		40.00

Usually, we have one pricing setting for each region and currency with market segment empty. The system displays it as BLANK.

Product Pricings > PP-104721

Pricing Settings

8 items • Sorted by Region • Updated 24 minutes ago

	☐ Pricing Setting Name ▾	Region ↑ ▾	Market Segment ▾	Currency
1	☐ PS-118719	China GCT		CNY - Chinese Yuan
2	☐ PS-118720	China GCT		USD - U.S. Dollar
3	☐ PS-118721	Europe		EUR - Euro
4	☐ PS-137772	India		EUR - Euro
5	☐ PS-118722	Japan		JPY - Japanese Yen
6	☐ PS-118739	Korea		EUR - Euro
7	☐ PS-118702	North America		USD - U.S. Dollar
8	☐ PS-118734	South-East Asia		USD - U.S. Dollar

Additionally, we could also have pricing settings for specific market segments, like in the screen below.

Product Pricings > PP-104482

Pricing Settings

10 items • Sorted by Region • Updated a few seconds ago

	☐ Pricing Setting Name ▾	Region ↑ ▾	Market Segment ▾	Currency
1	☐ PS-125209	China GCT		CNY - Chinese Yuan
2	☐ PS-127984	China GCT		USD - U.S. Dollar
3	☐ PS-120976	Europe		EUR - Euro
4	☐ PS-120975	Europe	CHANNEL PARTNERS (CH)	EUR - Euro
5	☐ PS-125605	Europe	AIRCRAFT & AEROSPACE & DEFENSE (AAD)	EUR - Euro
6	☐ PS-125606	Europe	OIL & GAS (OG)	EUR - Euro
7	☐ PS-120977	North America		USD - U.S. Dollar
8	☐ PS-125603	North America	AIRCRAFT & AEROSPACE & DEFENSE (AAD)	USD - U.S. Dollar
9	☐ PS-125604	North America	OIL & GAS (OG)	USD - U.S. Dollar
10	☐ PS-120973	South-East Asia		USD - U.S. Dollar

If we have the BLANK market segment and the specific market segment, the account manager is able to select between them.

Market Segment Selection

Product	Pricing Region	Currency	Market Segment	End Use	Pricing Market	Forecasted Annual Volume	MOQ
GALDEN D 05	China GCT	CNY	Select Market... ▾	Select EndUse ▾	BLANK ▾		100.00
GALDEN DET	China GCT	CNY	Select Market... ▾	Select EndUse ▾	BLANK ▾		100.00
					✓ BLANK		
					CHANNEL PARTNERS (...)		

If we don't have the blank market segment or the price list for the currency and the region, the system presents the pricing market without options and an error is displayed after click on "Add Product"

Market Segment Selection

Product	Pricing Region	Currency	Market Segment	End Use	Pricing Market
Tecnoflon SHP 86	Europe	EUR	AUTOMOTIVE (AUTO)	AUTO - O-RINGS, SEALS AND G...	Select Pricing Market

Cancel

Back

Add Product

ARE LIGHTNING

Home

Chatter

Accounts

Quotations

Products

Reports

Dashboards

More

Please indicate for all products the Market Segment, End Use & Pricing Market

Product	Pricing Region	Currency	Market Segment	End Use	Pricing Market	Forecasted Annual Volume	MOQ
FOMBLIN 30GX		USD	AUTOMOTIVE...	AUTO - CHAS...	Select Pricing...		
Fomblin D2		USD	CIVIL ROTOR...	CIVILR - CIVIL...	Select Pricing...		
FOMBLIN DA305		USD	BUILDING & C...	BC - COATING...	Select Pricing...		

Rules to add products into a quote:

When the account manager is adding product(s) into the quote, after clicking on Save button, the system should verify the following:

Compare if the Product Pricing Valid From is equal or less than Quote Valid From and Product Pricing Valid Until is equal or greater than the longest date between Quote Valid Until (Internal) and Quote Valid Until external

if yes, do nothing

if no, display an error message n the top of the page saying "The quote validity dates are outside the price list validity dates for [Product Name]. Please contact the PM or update the validity date of this quote" and hide the button "Send for Approval"

To be able to proceed the account manager should remove the product(s) from the quote or extend the quote valid From and/or Quote Valid To (Internal Only) and Quote Valid To (external) date(s).

Sandbox: UAT

ICaRe Lightning Home Chatter Accounts Contacts Me

The quote validity dates are outside the price list validity dates for KALIX 1855 GY 074. Please contact the PM or update the validity date of this quote

Extend 3 Month(s)

Opportunity
SQ GREEN POINT (SUZHOU) TECHNOLOGY/2022-7-1/240983

Opportunity Owner: Peter Ye
Opportunity Record Type Name: Sales Quote
Sales pricing case created: ☒
Quote Valid From: 01/07/2022
Quote Valid To (Internal Only): 30/11/2023

Follow New Note Edit Change Owner

Closed - Sales Started

Warning: Please be aware that this account is considered confidential. Read carefully any active NDA related to this account.

Opportunity Warning
Current stage: Closed - Sales Started

Details Chatter **Select Qty And Define Price** Business Service Related

Configure, price and quote

Payment term & Rebates

	Value	Justification	Approval
Standard Payment Term	Deviated Payment Term	Rationale	Approval Status
		Justification Comment	Payment Terms Approver
			Approver Comment

ICaRe Lightning Home Chatter Accounts Contacts Me

The quote validity dates are outside the price list validity dates for Fomblin D2. Please contact the PM or update the validity date of this quote

Opportunity
SQ APPLIED PLASTICS CO INC/2022-11-20/247120

Follow New Note Edit Change Owner

Product Info		Yearly Volume		Price & discount				Price Approval Justification			Approval Feedback			
Product	Pricing Market	* Annual Volume	Bracket	Price List	Last Quote Price	Scatter Plot	Variation vs Price list	Quote Price (after discount)	Financial Impact	Rationale	Description	Approval Status	Approver	Approver Comment
FOMBLIN DA 410	BLANK	Kg 5,000.00	720 - 119988 Kg	239.20 EUR / Kg	Link			EUR / Kg 239.20	0 EUR	-None-		No Approval Needed		
FOMBLIN DA 901	BLANK	Kg 6,000.00	720 - 100000 Kg	253.49 EUR / Kg	Link			EUR / Kg 253.49	0 EUR	-None-		No Approval Needed		
FOMBLIN 30GX	BLANK	Kg 8,000.00	40 - 200000 Kg	200.00 EUR / Kg	Link			EUR / Kg 200.00	0 EUR	-None-		No Approval Needed		
Fomblin D2	BLANK	Kg 9,000.00	6000 - 23999 Kg	220.42 EUR / Kg	Link			EUR / Kg 220.42	0 EUR	-None-		No Approval Needed		

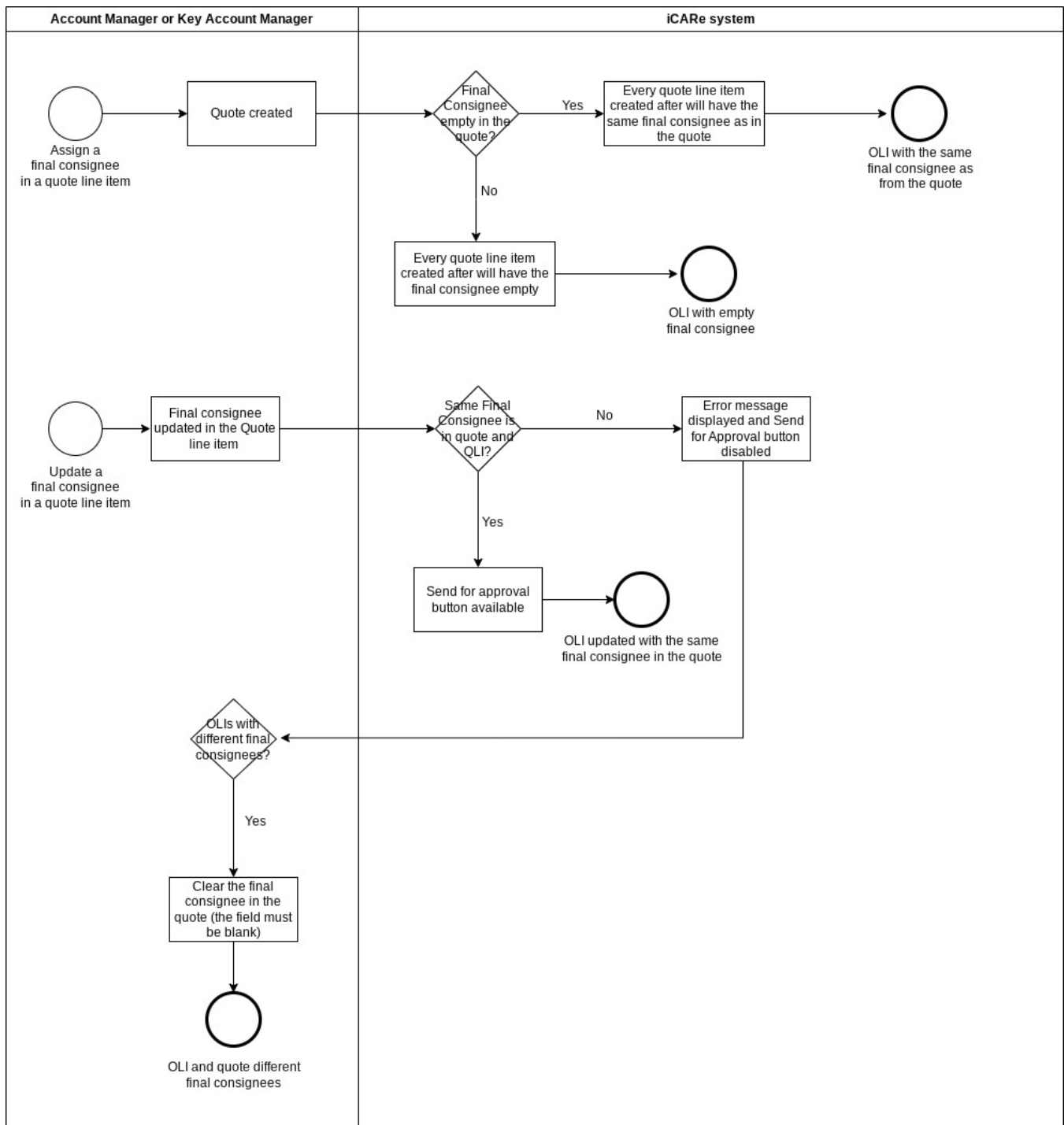
Send To Approval

From the example below, the quote validity dates in the green rectangle and the opportunity line items below, the opportunity line items allowed in this quote are OLI1, OLI7 and OLI8, because the validity dates are equal or longer than the quote validity dates.

1	...	Mar 22	Apr 22	May 22	Jun 22	Jul 22	...
2		Quote Quote start date 01-03-2022 Quote End Date 01-07-2022					
3	OLI 1 price start date 01-01-2022 price end date 31-12-2022						
4			OLI 2 price start date 01-04-2022 price end date 30-06-2022				
5	OLI 3 price start date 01-01-2022 price end date 31-04-2022						
6					OLI 4 price start date 01-06-2022 price end date 31-12-2022		
7		OLI 5 price start date 01-03-2022 price end date 31-05-2022					
8				OLI 6 price start date 01-05-2022 price end date 31-07-2022			
9		OLI 7 price start date 01-03-2022 price end date 31-08-2022					
10	OLI 8 price start date 01-02-2022 price end date 31-07-2022						

Rules to add final consignee into the OLIs:

Diagram Flow: <https://app.diagrams.net/#G1EyofPIJM7TMbEKk4wHzSSH58p973JI7r>



A final consignee is an SAP customer account or distributor that could be assigned to a quote line item, by clicking on the pencil next to the field, as you can see in the screenshot below:

Product(s)

Incoterms				Release Order		Final Consignee	Supply Information				
Product	Incoterms	Deviated Incoterm	Origin / Destination	Offer Pricing per release order volume?	Order Volume	Final Consignee	MOQ	Lead Time	Availability	Order Fulfillment	Contractual Commitment
FLUOROLINK MD 700 Pricing dates are not valid, please contact the Product Manager.		DDP	China	☐	Kg		40Kg	3 weeks	Unrestricted	Made to Order	Soft quote (allowing price rer

In the final consignee screen, the account manager can search by the name or the PRS Code.

Select Final Consignee

Search Account

345

Selected Final Consignee

Name	Customer Name	PRS Code(Account)	Account Record Type
IVSERVICE S.R.O.	IVSERVICE S.R.O.	345650	SAP Account Record Type
METALVUOTO POLSKA SP. Z O.O.	METALVUOTO POLSKA SP. Z O.O.	345753	SAP Account Record Type
JDEAL-FORM S.R.L.	JDEAL-FORM S.R.L.	423459	SAP Account Record Type
PETROLEUM INSTITUTE	PETROLEUM INSTITUTE	345727	SAP Account Record Type
3D LABORATORIES LLC	3D LABORATORIES LLC	2132345	SAP Account Record Type
CENTER LINE MOLD & TOOL	CENTER LINE MOLD & TOOL	2113345	SAP Account Record Type
REALJET	REALJET	345539	SAP Account Record Type

The final consignee could be a non-SAP customer, the account manager can choose an account without SAP/PRS Code as the final consignee.

However, the CSR will not be able to automatically send the prices to SAP (the "Send to SAP" button will be disabled because the PRS Code is missing).

The final consignee can be assigned in the quote or in the quote line items.

Final Consignee is assigned in the quote:

- when the final consignee is selected during the quote creation => for the products added after the quote creation, the system will automatically populate them with the same final consignee in the quote
- when the final consignee is selected without having products in the quote => same behavior as above
- when the final consignee is selected after adding products into the quote => the system will not update the final consignee on the products, the final consignee remains the same
- when the quote has a final consignee and the products are added after that => all the products added into the quote will be pre-populated with the same final consignee that is in the quote

Final Consignee assigned in the quote line item:

- the quote has no final consignee assigned (the field is blank), so the account manager is allowed to select any final consignee on the quote line item
- the quote has the final consignee A, when account manager assigns the final consignee A in the quote line item, the system allows him to do that
- when the account manager assigns the final consignee B into one quote line item, the system is checking the final consignee in the quote
 - if the final consignee is empty or B in the quote => the account manager is allowed to assign any final consignee and no error message is displayed
 - if the final consignee is populated in the quote and is not empty and is not B => the account manager will see an error message asking him to remove the final consignee in the quote because the rule is:
 - when there are multiple final consignees in the line items, the final consignee in the quote must be blank
 - when the final consignee is the same for all the quote line items and in the quote, no message is displayed and the records are saved
- if the account manager adds the same product in the same quote twice:
 - if the final consignee in both quote line items is empty => the system will display an error message and the account manager is not allowed to proceed before fix the error

Product(s)

Product	Incoterms			Release Order		Final Consignee	Supply Information				
	Standard Incoterm	Deviated Incoterm	Origin / Destination	Offer Pricing per release order volume?	Order Volume	Final Consignee	MOQ	Lead Time	Availability	Order Fulfillment	Contractual Commitment
PPS BR42B	CIP	-None-		☐	Kg		2000Kg	12 weeks	Unrestricted	Made to Order	Soft quote (allowing price rer
PPS BR42B	CIP	-None-		☐	Kg	Multiple lineitems with same Product and Final Consignee	2000Kg	12 weeks	Unrestricted	Made to Order	Soft quote (allowing price rer

- if the final consignee in both quote line items is the same => the system will display an error message and the account manager is not allowed to proceed before fix the error

Product(s)

Product	Incoterms			Release Order		Final Consignee	Supply Information				
	Standard Incoterm	Deviated Incoterm	Origin / Destination	Offer Pricing per release order volume?	Order Volume	Final Consignee	MOQ	Lead Time	Availability	Order Fulfillment	Contract
PPS BR42B	CIP	-None-		☐	Kg	CHANGZHOU GEASURE MEDICAL	2000Kg	12 weeks	Unrestricted	Made to Order	Soft qu
PPS BR42B	CIP	-None-		☐	Kg	CHANGZHOU GEASURE MEDICAL Multiple lineitems with same Product and Final Consignee	2000Kg	12 weeks	Unrestricted	Made to Order	Soft qu

- if the final consignee in both quote line items is diffetent (different final consignees or one quote line item without final consignee and the other one with final consignee populated) => the system allows the account manager to proceed

In order to fix the errors above, the account manager should follow the rule:

- in the quote, the system only allows one quote line item with the following combination: account + product + region + currency + final consignee

Rule to determine Opportunity Market Cluster

HOW Is it working ?

Market Cluster is automatically populated based on the end use value. The calculation rules are inside **EndUse_TriggerUtility** class, on the method **getMarketCluster** and the possible values assigned to Market Cluster are the following:

- if account Team_Cluster__c is empty then Market_Cluster__c = Not Identified
- if account Team_Cluster__c is Channel Partners then Market_Cluster__c = Channel Partners & Digital Sales
- if End_Use__c from Realized Sales/Opportunity/Opportunity Product record is empty then Market_Cluster__c = Not Identified

There is a configuration matrix called End Use Mapping (End_Use_Maping__mdt) in iCARE that contains all the End Use values + the corresponding Market Cluster. This matrix must be updated every time we update or create new Market Cluster or End Use.

- if End_Use__c from Realized Sales/Opportunity/Opportunity Product record doesn't match the end use value

in the End Use Mapping then Market_Cluster__c = Not Identified

- if End_Use__c from Realized Sales/Opportunity/Opportunity Product record is not empty, check:
 - if End_Use__c first 40 characters exists in End Use Mapping then get Market_Cluster__c value

If this condition fails, tries the following:

- if End_Use__c exists in End Use Mapping then get Market_Cluster__c value

Rules to hide Send for Approval button:

Every time there is an error message displayed in red in any OLI or the system displays a warning icon next to the product name, the button Send for Approval is disabled.

Rules to determine the quote line item approver when the price is deviated:

Price deviation might trigger an approval process depending on the quote price after discount amount (available in the column Quote Price (after discount)).

Product(s)

Product Info		Yearly Volume		Price & discount						Price Approval Justification		Approval Feedback		
Product	Pricing Market	Annual Volume	Bracket	Price List	Last Quote Price	Scatter Plot	Variation vs Price list	Quote Price (after discount)	Financial impact	Rationale	Description	Approval Status	Approver	Approver Comment
PPS BR42B	BLANK	Kg 4,000.00	2000 - 9999 Kg	16.91 EUR / Kg		Link	5.38%	EUR / Kg 16.00	-3640 EUR	Competitive threat	discount for new customer	Approval Needed	Dries Steijnen	
PPS BR42B	BLANK	Kg 2,000.00	2000 - 9999 Kg	16.91 EUR / Kg		Link	11.30%	EUR / Kg 15.00	-3820 EUR	Competitive threat	discount for new customer	Approval Needed	Dries Steijnen	

The approval thresholds are configured in the product bracket. Every quote line item is linked to a pricing setting that has product brackets.

The product bracket is pointing the reference price for the product on each quote line item, based on the annual volume filled-in by the account manager.

After having the annual volume, the system determines the product bracket and the pricing setting and displays the reference price.

The account manager can deviate the price proposed on the price list and some scenarios can happen:

- no approval needed when
 - the price is below the threshold Product Manager Approval
 - the price is equal or above the reference price
- approval is needed when
 - the price after discount is equal to or above the Product Manager Approval and below the Sales Director Approval thresholds => requires product manager approval
 - the price after discount is equal or higher than the Sales Director Approval threshold => requires regional sales director approval

In a quote, if there is at least one quote line item that requires regional sales director approval, the system assigns all the other quote line items that require approval,

to the same regional sales director, in order to avoid have different people approving the deviations.

The thresholds can be found in the product brackets, as we can see below:

 Product Bracket
PB-352390

Related

Details

Type

Webshop-only Bracket

Product Bracket Details

From
2,000.00

To
9,999.00

Price
EUR 16.91

Regional Approval %
21.35%

Bracket Lead Time
12 weeks

Self Approval %
0.00%

Bracket Comment
None

Product Manager Approval
EUR 13.30

Sales Director Approval
EUR 16.91

The sales director is determined by the [routing matrix](#) - Local Empowerment (Sales QUotes)

Sales director is identified depending on:

- Opportunity line item object: Market_Cluster__c
- Account object: Reporting_Region_ECCO__c

Market Segment is automatically calculated for Opportunity Products (Opportunity_Line_Item__c) inside **Opportunity_Line_Item_TriggerHandler** class and is also automatically calculated for Sold and Pending (Sales_Order__c) inside **SoldAndPendingTriggerUtility** class.

The rules to determine the Market Segment for both are the following:

- if AccountId + Product__c (Match_Type__c = 'Product') matches on End_Use__c object records

OR if AccountId + Product_Hierarchy__c (Match_Type__c = 'Product Hierarchy') matches on End_Use__c object records then get End_Use__c from End_Use__c object to populate End_Use__c from Opportunity_Line_Item__c/Sales_Order__c and get Market_Segment__c from End_Use__c object to populate Market_Segment__c from Opportunity_Line_Item__c/Sales_Order__c

The rules to calculate Market Cluster for Sold & Pending are inside **SoldAndPendingTriggerUtility** class. They are the following:

- Search the End_Use_Text__c value from S&P record on the End Use Mapping (End_Use_Mapping__mdt)
- if End_Use_Text__c exists in End_Use_Mapping__mdt then get Market_Cluster__c value from the matrix to update Market_Cluster__c field

The rules to calculate Market Cluster for Realized Sales are inside **SalesTriggerUtility** class. They are the following:

- Search the End_Use__c value from Realized Sales record on the End Use Mapping (End_Use_Mapping__mdt)
- if End_Use__c exists in End_Use_Mapping__mdt then get Market_Cluster__c value from the matrix to update Market_Cluster__c field

Market cluster field is automatically populated according to the different scenario below in the priority order:

In case, market cluster= Not identified, the approver would be the Product manager by default.

For all combination between Market Cluster and Reporting ECCO region, a Sales director is identified in the Routing Matrix.

For instance:

- Market Cluster at the OLI level: Channel Partners
- Reporting ECCO region of the Opportunity's account: EMEA
- Sales director is Dries Steijnen

Rules to determine the approver when the Incoterm is deviated in the quote line item:

Standard incoterm is automatically populated from the pricing setting linked to the OLI. This value can be edited in the "Deviated incoterm" column.

If the incoterm is deviated, the Sales director will be the approver depending on the combination in the routing Matrix.

Rules to calculate the last quoted price:

Documentation:

Diagram Flow: To be done

The last quoted price is calculated by the system for quote line items and opportunity brackets (when release order volume is selected).

For quote line items, the system does the following calculation:

- searches for the quote line items that match the account + product + region + currency + final consignee
- orders the results starting by active quote line items in Closed - Sales Started quotes, inactive line items in Closed - Sales Started quotes, inactive line items in Quotes Expired
- if the system found one active quote line items in Closed - Sales Started quotes, this will be the last quoted price displayed, otherwise, continues.
- if the system found an inactive line items in Closed - Sales Started quotes, this will be the last quoted price displayed, otherwise, continues
- if the system found an inactive line items in Quotes Expired, this will be the last quoted price displayed, otherwise, won't display anything

For opportunity brackets (when the order release volume is selected), the system does the following calculation:

- searches for the quote line items that match the account + product + region + currency + final consignee and Offer Pricing per release order volume? is checked
- if there is one or more matches, the system gets the opportunity brackets linked to the quote line items ordered by active quote line items in: Closed - Sales Started quotes, inactive line items in Closed - Sales Started quotes and finally inactive line items in Quotes Expired
- compares if the From and To volumes in the new opportunity brackets are equal or within the previous quotes volumes

- if there is a match, the system gets the order release price and displays the last quoted price, otherwise, the last quoted price is blank

Opportunity
SQ_ALPS LOGISTICS CO., LTD./2022-10-17/250637

[+ Follow](#)
[New Note](#)
[Edit](#)
[Change Owner](#)

Product(s)

Product Info		Yearly Volume		Price & discount					Price Approval Justification		
Product	Pricing Market	* Annual Volume	Bracket	Price List	Last Quote Price	Scatter Plot	Variation vs Price list	Quote Price (after discount)	Financial impact	Rationale	Description
PPA A-4160 HSL BK324 Pricing dates are not valid, please contact the Product Manager	BLANK	Kg 20,000.00	10000 - 29999 Kg	1066.13 JPY / Kg	Link		8.55%	JPY / Kg 975.00	-1822600 JPY	Growth customer	Description needed in case of discount

Order Release Pricing

PPA A-4160 HSL BK324

From	To	Order release price	Last Quote Price
1,000 Kg	4,999 Kg	975.00 JPY	
5,000 Kg	9,999 Kg	940.18 JPY	
10,000 Kg	1,000,000 Kg	870.54 JPY	874 JPY

☐ Deviate from standard brackets ?
Description of Bracket Deviation

Last quoted price is saved in the database when OLI is activated, but displayed only when the quote is closed sales started.

Rules to deactivate quote line item:

- when there is an existing quote line item active with the same combinations: account + product + region + currency + final consignee
- when the quote valid until internal date is less than today

Rules to turn the quote into Closed - Expired:

- when all the quote line items are inactive
- when the quote valid until internal date is less than today
- when there is another quote or quotes including the quote line items active for the same combination account + product + region + currency + final consignee

Error handling provided by the system in quotation:

When there is an error in a quote line item, the warning icon is displayed next to the product name, so the account manager can quickly identify that there is one or more errors to fix. The error message appear next to the fields that are in error.

When the error is red, is a blocking error and the system will not allow the account manager to proceed.

When the error is orange, is not a blocking error and the account manager can proceed but is an important alert for an action that needs to be taken as soon as possible.

PPS BR42B

CIP

-None-

Kg

CHANGZHOU GEASURE MEDICAL
Multiple lineitems with same Product and Final Consignee

Field	Error	Color Code
Annual Volume	Enter a quantity above MOQ	Red
Final Consignee	Multiple line items with same Product and Final Consignee	Red
Final Consignee	Please click the "Create SAP account" - at the account level - to allow the price to be entered in SAP	Orange

Rationale & Description	Rationale is mandatory to fill a Discount Description is mandatory to fill a Discount	Red
Order Volume	Is mandatory when Offer pricing per release order volume is ticked	Red
Deviated Incoterm	Must be different from Standard Incoterm	Red
Order Volume	Must be blank when "Offer pricing per release order volume?" is not ticked	Red
Product	Quote validity dates are outside the price list validity dates. Contact the PM to update price validity dates or update the validity dates from this quote Today in UAT, to reduce the amount of text, we have: Pricing dates are not valid	Red
Final Consignee in the OLI	In order to proceed with different Final Consignees please remove the final consignee at the quote level	Red
Rationale next to Deviated Payment Term	The Payment Term deviation rationale is mandatory.	Red
Product	Quote validity dates are outside the price list validity dates. Contact the PM to update price validity dates or update the validity dates from this quote	Red
Deviated Payment Term	Deviated payment term and Standard payment term must be different.	Red
Justification Comment	If Deviated payment term is "Other (Please Describe)" the Payment term description is mandatory.	Red

Documentation Folder: