

FD - [CORE] 6 - Send to Customer & Customer Approves

// Generate PDF

As an Account Manager, at any stage of the Quote process, I can generate a PDF of the current Quote, containing detailed information about the products included in it and the conditions.

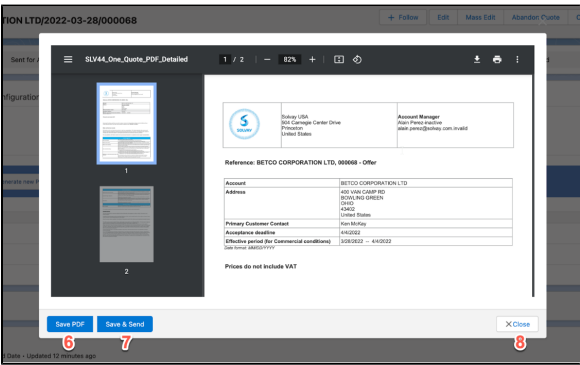
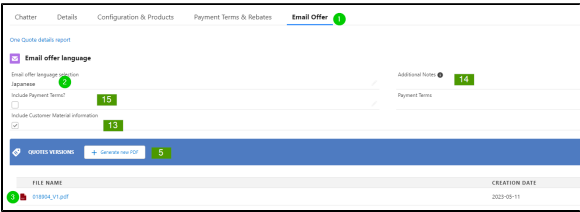
This functionality can be found in "Email Offer" (1) tab at the top of the Quote record, beside the "Configuration and Product"

Available actions:

- I can select the language in which the PDF file will be generated (2)
- By Default the Customer Material number" is included. The account manager can decide not to include them. (13)



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- **FD - [CORE] Customer Product Object & Interface**
- The Account manager can decide to add addition note to the quote. This will be printed when the pdf is generated (14)



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- The Account manager can decide to include Payment terms in the PDF.
 - By default it is SET.
 - The Payment terms are set at One Quote Creation & One Quote "Send for Approval" with the value of the Sold To. Payment terms



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customer material number in the quote
PDF **CLOSED**

*By Default, the Email Offer Language is
the one from the contact.(OneQuote.
Contact.language).*

*If the Contact language is not available
in the Email Offer, by default it is set to
English*

- I can check older versions of
the PDF **(3)** and check which
version has been sent already
to the customer **(4)**
- I can generate a new PDF **(5)**

Email Offer Language availability

- Novacare
 - Chinese
 - English US
 - French
 - German
 - Italian
 - Japanese
 - Korean
 - Portuguese (Brasil)
 - Spanish
- TS
 - English



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

- German
- Spanish
- French
- Italian
- Portuguese
- Korean
- Japanese
- China

Generate new PDF

When clicking on the new PDF button, I get a pop-up window displaying the new PDF file. From there, the following actions are available:

- I can save a version of the current PDF **(6)**
- I can save the current version of the PDF and go directly to the Send to Customer screen **(7)**
- I can cancel the current PDF without saving **(8)**

[PDF Details Link](#)

III/ Send Quote to Customer

As an Account Manager, there are two places where I can send a PDF copy of the current Quote to the Customer:

- Using "Save & Send" button from PDF pop-up:

When clicking on the "Save & Send" button, I get redirected to an Email edition screen, in which the PDF file is automatically attached, and the Customer Contact of the current Quote is set by the recipient by default.

An email template for Quote is displayed by default, I can select other templates if available, edit the text, and add extra recipients if needed.

- Sending an previously created copy of the PDF

In the Quote Version section of the tab, I can find in each line a button **(9)** to send via email that specific version of the PDF. This option will open the same Email screen described above.

Automations:

- If the current Status of the Quote is "Approved" when the Quote email is sent to the customer, then the Quote is automatically moved to status "Sent to Customer"

III/ Customer Approval

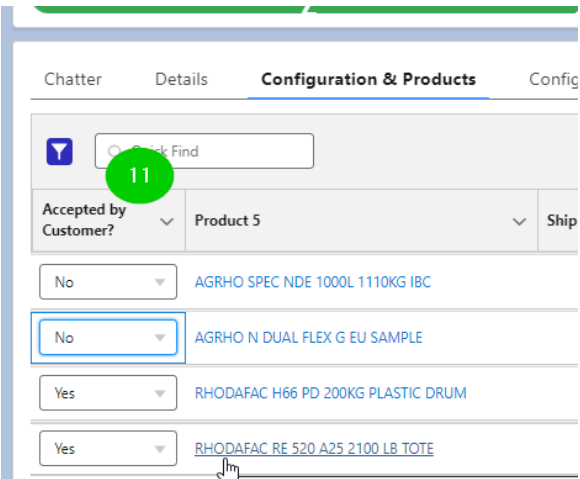
 **Unable to locate Jira server for this macro. It may be due to Application Link configuration.**

As an Account Manager, once the Quote is approved internally and Sent to the customer, and I have received confirmation from the customer to proceed with the offer, I can manually accept the products in the Quote, either by clicking on the "Accept all products" button **(10)** or by accepting the products one by one **(11)**.

Once all the products in the Quote are accepted, then I can move the Quote record to the next stage.

For that, I have the "SAP Upload preparation" button **(12)**, which will trigger the following actions:

- Quote Status will be moved to "SAP Upload preparation"
- A new Load Price to SAP task will be created and assigned to the right Queue of CSR users, depending on the region.



Chatter Details **Configuration & Products** Config

Find

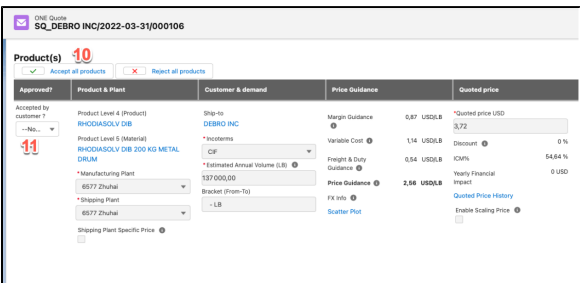
Accepted by Customer? Product 5 Ship

No AGRHO SPEC NDE 1000L 1110KG IBC

No AGRHO N DUAL FLEX G EU SAMPLE

Yes RHODAFAC H66 PD 200KG PLASTIC DRUM

Yes RHODAFAC RE 520 A25 2100 LB TOTE

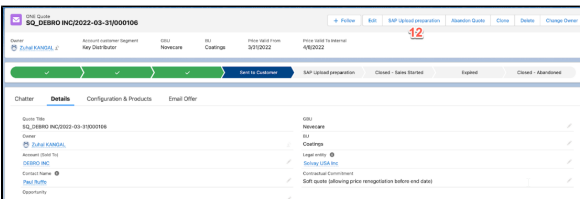


100 Quote
SQ_DEBRO INC/2022-03-31/000106

Product(s) 10

Accept all products Reject all products

Accepted?	Product & Plant	Customer & demand	Price Guidance	Quoted price
Accepted by customer?	Product Level 4 (Product) RHODASOLV DB	Ship-to DEBRO INC	Margin Guidance 0.87 USD/LB	*Quoted price USD 3.72
	Product Level 5 (Material) RHODASOLV DB 200 KG METAL DRUM	*Incoterms CIF	Variable Cost 1.14 USD/LB	Discount 0 %
	*Manufacturing Plant 6577 Zhuzhai	*Estimated Annual Volume (LR) 537000.00	Freight & Duty Guidance 0.54 USD/LB	ICM% 54.64 %
	*Shipping Plant 6577 Zhuzhai	Product (from To) - LR	Price Guidance 2.58 USD/LB	Yearly Financial Impact 0 USD
	Shipping Plant Specific Price		FX Info Scatter Plot	Quoted Price History Enable Scaling Price



100 Quote
SQ_DEBRO INC/2022-03-31/000106

Follow Edit SAP Upload preparation Action Queue Close Delete Change Owner

Name	Account customer	Region	Status
SUNSHINEAL	Key Distributor	North America	SAP Upload preparation

Chatter Details Configuration & Products Email Offer

Quote Title
SQ_DEBRO INC/2022-03-31/000106

Owner
John CANTON

Account Lead Tel
DEBRO INC

Contact Name
Paul Noffs

Comments

OSU
Newcomer
RA
Country
Lead note
Setting USA Inc
Estimated document
Soft quote following price negotiation before end date