

# [CORE] Renewal Process

**IPP-2316** update: New screen in the Renewal pop-up was added to allow users to select rejected by customer One Quote Line Items from the quote being renewed.

**IPP-2315** update: Possibility to add personalized Quote Title by the user in the first screen of the renewal process.

## Renewal process current full description:

In order to Renew one quote user have to click the 'Renew One Quote' button. This button is visible ONLY when One Quote is in 'Closed - Sales Started' or 'Expired' status and the 'is Owner or Admin?' field equals true.

### First Screen:

In the first screen of the renewal process user have the option to select dates of 'Price Valid From', 'Price Valid To' and 'Offer Expiring by'. User has also the possibility to provide personalized Quote Title. Fields marked with red star are mandatory to fill in order to proceed.

Renew One Quote

Please select new dates for the renewed quote

Quote Title

\* Price Valid From 6/16/2023

\* Price Valid To 9/16/2023

Offer Expiring By

Cancel Next

### Second Screen:

In the second screen user have the chance to select One Quote Line Items rejected by the customer. If there is no item rejected by the customer this step is being skipped.

Renew One Quote

You are about to renew one quote.

Below is a list of products previously rejected by the customer. Please select rejected products you would like to include in renewal quote.

<input type="checkbox"/>	Product	Ship To Account	Ship To city	Inco...	Quoted pr...	Currency	U...
<input type="checkbox"/>	BP Test Product 5	TEST DANGEROUS		CIP	50	EUR	KG
<input type="checkbox"/>	TP Test Product 5	TEST DANGEROUS		CIP	0.9	EUR	KG

Cancel Back Next

### Third Screen:

In the second screen user have the chance to select optional One Quote Line Items from other One Quotes. If there is no optional item this step is skipped.

In this step, item has to meet the following conditions to be displayed:

- the same Account Sold To as One Quote being renewed
- the same Pricing Region as One Quote being renewed
- the same Bussines Unit as One Quote being renewed
- Status of the Quote equal to 'Closed - Sales Started'
- Product Level 5 cannot be empty

- One Quote Line Item have to be active (Is Active field equals true)
- One Quote Owner have to be equal to current user

**Additional Information:**

When One Quote was already renewed, then the user got the information in the pop-up, and proceeding with renewal is impossible.

### Renew One Quote

This quote has been already renewed in the following record: [008119](#)