

[CORE] Renewal Proccess

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.

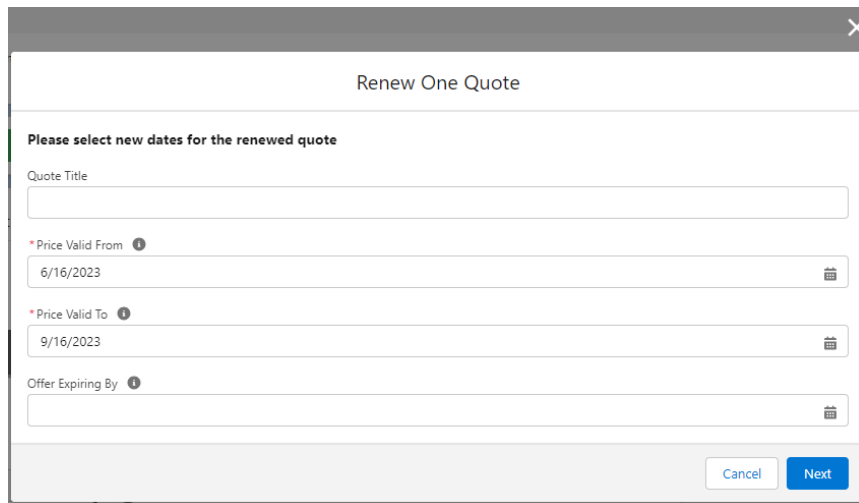
IPP-2315 update: Possibility to add personalized Quote Title by the user in the first screen of the renewal process.

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.

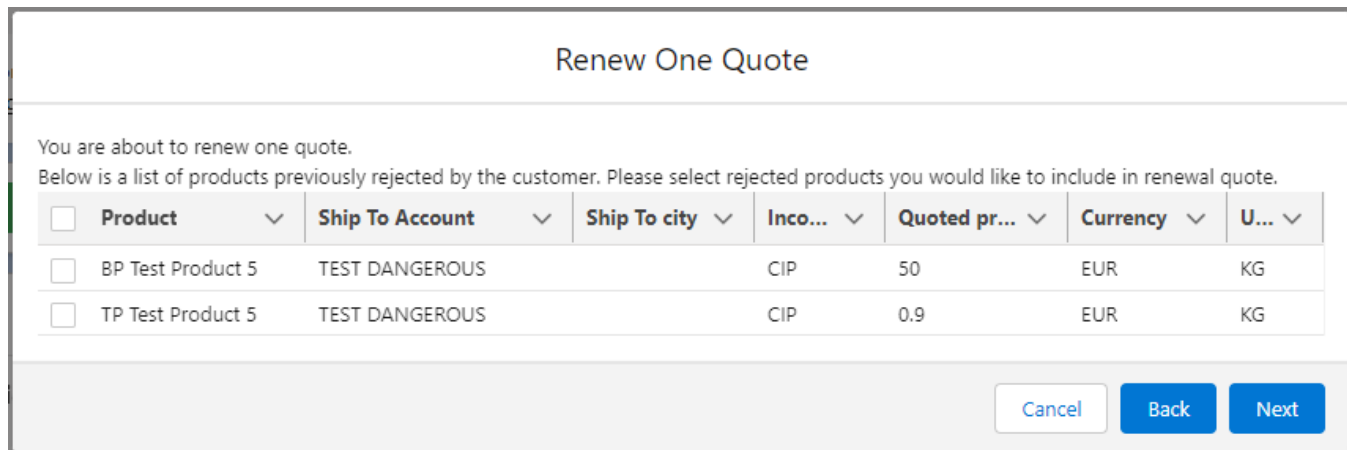
First Screen:

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.



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.



☐ Product	Ship To Account	Ship To city	Inco...	Quoted pr...	Currency	U...
☐ BP Test Product 5	TEST DANGEROUS		CIP	50	EUR	KG
☐ TP Test Product 5	TEST DANGEROUS		CIP	0.9	EUR	KG

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

Cancel