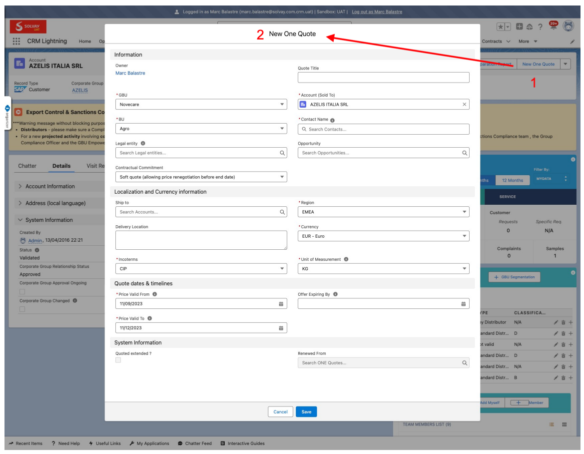
FD - [CORE] 1 - Create Quote From Account, One Quote, CPCs - Payment terms&Rebates

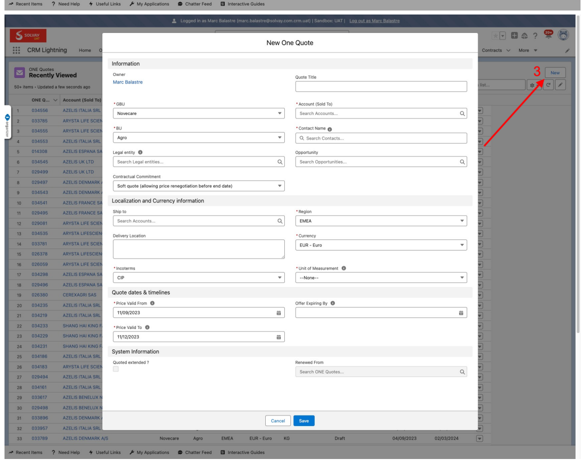
An Account Manager will start the process of creatin a quote from mutlipe ways :

- 1 /From scratch :
  - From the Account Page
  - From the One Quote Page
- From exising data
  - From CPCs ==> FD - [CORE] Pricing Campaign - Request creation of a quote
  - From existing quote - Clone ==> FD - [CORE] 2 - Extend / Renew / Clone One Quotes
  - From existing quote - Renew ==> FD - [CORE] 2 - Extend / Renew / Clone One Quotes
- Payment terms

The Account Manager must have the "One Sales Quote" Permission in order to create the quote

1/ Create Quote From the Account Page





On the Account page a click on "New One Quote" (1) and fill all data (2)

(1) "New One Quote" button is alawys displayed

(2) Fill Data, some field will be automatically prepopulated or have specific features

On the One Quote List view click on "New" **(3)**

The same creation page is used with the following criterion

- Quote Title:
  - Can be set by user,
  - If left blank will be automatically populated with: 'SQ_' & SLV44_Account_Sold_To__r.Name & '/' & TEXT(DATEVALUE(CreatedDate)) & '/' & Name

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- GBU :
  - PreFilled with the current user.GBU
- BU
  - PreFilled with the current user.BU
- Account (Sold To)
  - PreFilled with the Account the user were in. (if from Account)
  - *Validation Rule : You can't create a quote for a Corporate Group.*
  - *Validation Rule: You cannot create a quote from an account that is marked for deletion in SAP*
- Contact Name
  - The user can select only contact from the Account Sold To or its Parent.
    - If Account Sold To Parent. Name = Decision Various then Only Contact from the Account Sold To are displayed
  - *Validation Rule : Please select a contact related to the*

    account or linked to the account through the Corporate Group.

- Region
    - PreFilled with the current user.Region
- Currency
    - PreFilled with the current user.Currency
- Incoterms
    - Default Value is CIP
- Unit of Measurement :
    - set by default to Account.Unit of measurement if the quote is created from an account
        - Quote Unit of Measurement
            - IF (NOT (ISPICKVAL(SLV_Region__c, 'NAM')) , 'Kg', 'Lb')
- Price Valid From
    - preflled with : Today +7 days
- Price Valid To
    - preflled with : Grace period Default Value
    - *Validation Rule : Price Validity must not exceed Max External Validity*
    - *It also applies for Renew & Cloning quote*
    - Grace period settings *FD - [CORE] Grace Period*

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- Offer Expiring By
- Legal Entity :
  - *Legal entity is mandatory if GBU of the One Quote is different than Novecare*
  - *If GBU Novecare & not filled by the user it is autopulutated at insert with the*

follwing rule

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- IF the **Legal Entity** field is **BLANK,** prepopulate the field following these conditions:
    - If ONE Quote Account Sold To Region = NAM & GBU = Novecare : Solvay USA INC

- If ONE Quote Account Sold To Region = LAM & GBU = Novecare : RHODIA BRASIL S.A.
- If ONE Quote Account Sold To Region = EMEA & GBU = Novecare : Rhodia Opérations

            - If ONE Quote Account Sold To Region = APAC & GBU = Novecare : Solvay (Zhangjiagang) Specialty Chemicals Co Ltd
    - *If GBU is TS the field must be filled at Quote Creation*
- *Contract linkage*
    - *The account manager can check the box "Link to Existing Contract" then it display a popup to link a contract with the fllowing critera tht are applied only at Draft status :*
        - Contract status = Active
        - AND (Quote Account = Contract Account
        - OR Quote Account : corporate Group = Contract Account
        - OR Quote Account = Contract Sold To Account)

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Rebates

Account Managers can enter a Rebate in the quote when the status is Draft. The Rebate section is just a text field where the user can enter all details related to the Rebate.

In addition the Account manager has field : Rebate URL, that can be used to store the link to the rebate file that need to be loaded in SAP.

If an AM enters a Rebate, the approver will see a banner on the top of the quote so that they review it before approving or rejecting the price.

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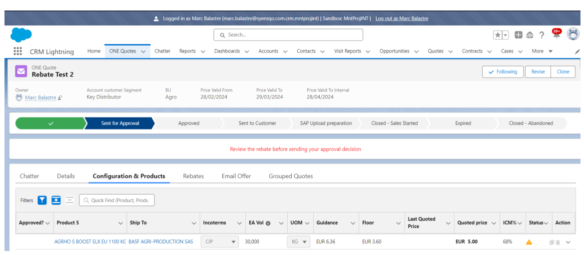

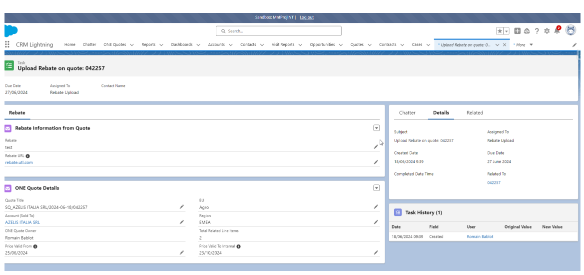

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FD - [CORE] 7.2 - CSR Tasks : Update Rebate

When the a quote containing a Rebate is moved to "SAP Upload Preparation" the system creates a task for the CSR that contains the Rebate Details.

- RT : “Upload Rebate”
- Dut date is set to + 7 business days
- Subject = “Upload Rebate on quote : 042130”
- Related to the quote
- Owner = “Rebate Upload Queue”

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The CSR managing this "upload rebate" tasks is responsible for uploading this rebate to SAP. It's a manual activity for which several CSR around the globe are trained.

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~~Once the Rebate is in SAP, they update the Rebate Acknowledgement to "Acknowledge and updated in SAP". Then they can close the task.~~

SF - Novecare - Data push to SAP

Multiple Sold To

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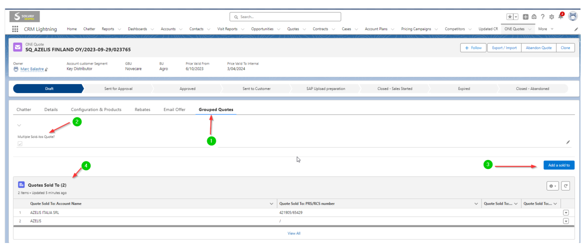
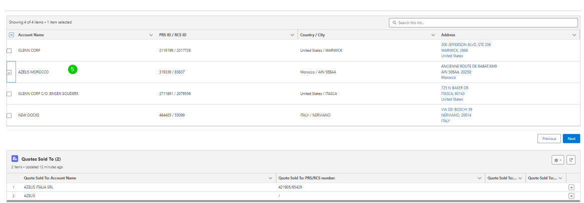




For Account Manager that manage same price for multiple Sold to they can manage it through the "Grouped Quote" tab (1) that is available at Draft Status.

The account manager can tick the box : "Multiple Sold-tos Quote?" (2).

Once it is checked the account manager :

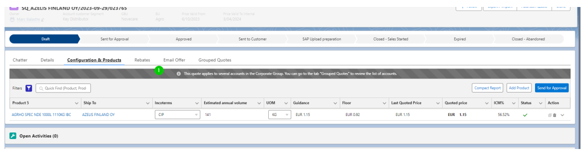
- Can not anymore Mass Edit the quote
- Can not update OQLI Ship to
- Can not clone quote line
- Can link a new sold to (3) & (5) with the following criterions
    - all Account with the same “Quote. Account.Corporate group” + Partner type = “Ship To” or” Sold-to & Ship-to” + Do no show the Quote Account
    - and not already in the linked to the quote

- Account Sub partner type = “Sold to & Ship to”

The list of quote sold to is display at the bottom of the page. (4)

Once que quote is not at DRAFT Status, the Account Manager can not EDIT / DELETE Quote Sold to list. The "Add a sold to" button is hidden

When the user access the Configuration & Product an additinal note identify that it is a grouped quote (1)



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