

FD - [CORE] 2 - Extend / Renew / Clone One Quotes

In order to don't have to re do from scratch the configuration of a One Quote for similar clients or to requote same products when an active quote expires, Account managers have the possibility to:

- Extend validity dates of a quote without any approval requested
- Renew an active or an expired One Quote
- Clone an existing One Quote

- I/ Extend One Quote
- II/ Renew One Quote
 - II.I : Reminder on quote about to Expire
 - II.II How to renew a quote
- III/ Clone One Quote

I/ Extend One Quote

As an Account Manager, I can without approval extend once the validity of my quote by 30 days.

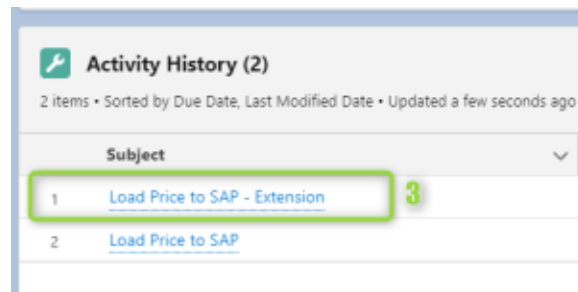
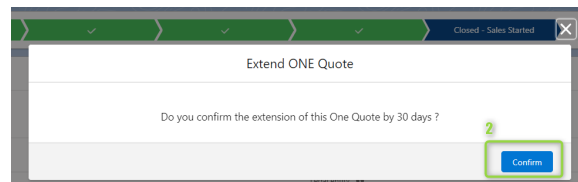
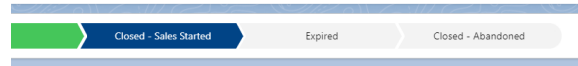
This feature is available clicking the "Extend One Quote" button (1) at the top of the One Quote layout

Conditions for the button to be displayed:

- The One Quote status has to be "Closed - Sales Started"
- AND the "Quote extended ?" checkbox has to be false

After confirming the Extension (2):

- "Price Valid To Internal" is updated to CURRENT "Valid to (internal)" date + 30 days
- "Quote extended ?" is updated to true
- The creation of a new task is triggered for data input into SAP with a subject named "Load Price to SAP - Extension" (3)



II/ Renew One Quote

II.I : Reminder on quote about to Expire

An Account manager will receive on **every Friday** an Email that will let him now that he has some quotes to renew within 15 Days (Price Valid To).

Quote that are already Renewed (Renewed To filled) are not part of this reminder

Dear Romain,

This is a friendly reminder that there are **2 quotes** in your portfolio that are about to expire within the **next 15 days**. To ensure that our clients receive the best possible service, we encourage you to review these quotes and renew them accordingly.

To make this process easier, we have created a report that lists all of the quotes that are about to expire. You can access this report by clicking on the following link: [Report Link](#).

Please take the time to review the report and renew any quotes that are about to expire. This will help us to continue meeting our clients' needs and provide the best possible service.

If you have any questions or concerns, please do not hesitate to reach out to us. We are always happy to help.

Thank you for your cooperation, and we look forward to working together to achieve our common goals.

Best Regards,
Pricing team

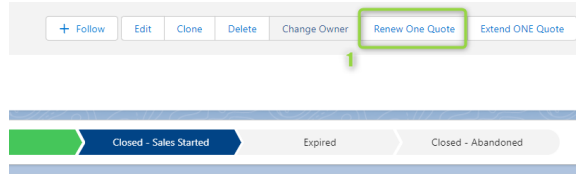
II.II How to renew a quote

As an Account Manager, I can do a full cloning of an existing quote to don't have to configure it from scratch again.

The feature is available clicking "Renew Quote" button (1) at the top of the One Quote layout

Conditions for the button to be displayed:

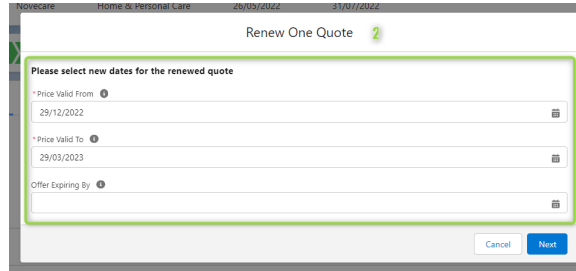
The One Quote status has to be "Closed - Sales Started" or "Expired"



Initial Test

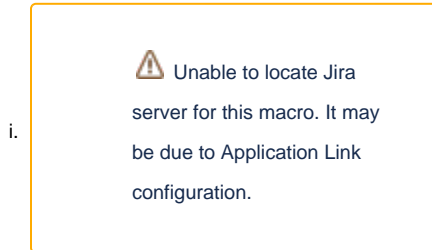
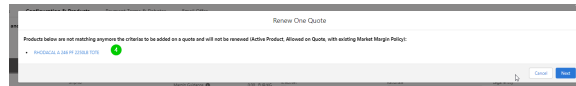
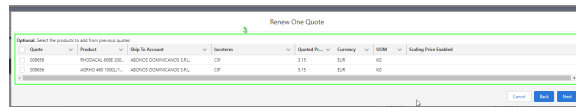


- If the quote renew to is set and the renew to quote is Closed Abandoned :
 - A warning message prevent the user to create quote as it has already been renewed. An additional button "renew one quote" is displayed and the user can "force" the renewal.
- If the quote renew to is set and the renew to quote is **NOT** Closed Abandoned :
 - A warning message prevent the user to create quote as it has already been renewed

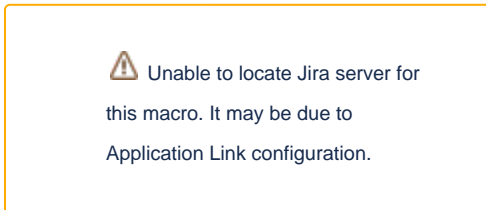


Renewal steps:

1. First screen (2) asks the user to confirm the date fields prepopulated following dates creation rules:
 - a. Price Valid From
 - b. Price Valid To
 - c. Offer Expiring By
2. After clicking on "Next" we check if there is some OQLI not matching anymore the criterias to be added to the renewed quote. If one of the condition below is met the product line won't be cloned and displayed on the second screen for information:
 - a. OQLI.SLV44_Product_Level_5__c.IsActive=False
 - b. OR OQLI.SLV44_Product_Level_5__c.SLV44_Allow_Product_on_Quote__c = False
 - c. OR No active "Region and Market Pricing" records link to the product level 4 with the same combination of BU /Pricing Region than the One Quote
3. Then clicking on "Next" we perform the full cloning creating the new One Quote and related product lines
 - a. Copy of the same estimated annual volume, incoterms, quoted price, rationale, description, Incoterm Details, Lead Time, MOQ, Special custiler information as the original.




4. If there are other Active quotes for the Sames Sold To, the user can select to add active products to the renewed quote (3)




- b. We display :


- i. Quote Number
- ii. Product
- iii. Ship To Account
- iv. Shipt To City

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- v. Incoterm
- vi. Quoted Price
- vii. Currency
- viii. UOM
- ix. Price Valid From

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- x. Price Valid To

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- xi. Scaling Price Enabled

c. The following criteria need to be check in order to display theses lines :

- i. Quote Status = "Closed - Sales Started"
- ii. Quote Sold To = Sold to of the new quote
- iii. Quote pricing region = Pricing region of the new quote
- iv. Quote BU = BU of the new quote
- v. Not to display on this new screen the combinaison of product & ship to that are already in the quote.
- vi. One Quote.Owner = Logged in User
- vii. Quote Line .Is Active = True

5. If there are NO other Active quotes for the Sames Sold To, with Active Price settings the user can NOT select them and a message warn them. The list of product that can not be renewed are displayed. (4)

After confirming the Renewall :

• **One Quote Updates:**

1. Dates values coming from the first screen
2. Status of the renewed One Quote updated to "Draft"
3. ID of the original quote populated on the One Quote "Renewed From" lookup field
4. SLV44_Quoted_extended__c field updated to false

• **One Quote line item Updates:**

1. Clone all the OQLI not matching criterias of the second step
2. Copy all fields except approver fields, Region and market pricing, volume bracket, One Quote

3. All fields below will be well recomputed: Margin Policy bracket, all price guidance fields, ICM %, Discount, Approvers fields
4. RMP and volume bracket lookups are automatically recalculated
5. ID of the original One Quote line items populated on the new One Quote line item "Renewed From" lookup field
6. ID of the renewed One Quote one the One Quote lookup
7. "IsActive" field updated to false

III/ Clone One Quote

As an account manager I have the possibility to clone either the Quote header and the products so that it is easier to create quotes for similar customers

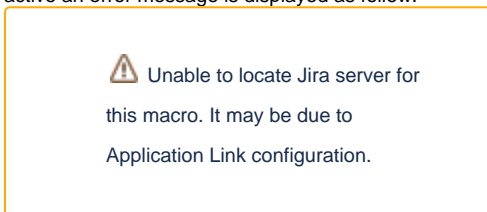
The feature is available clicking "Clone" button (1) at the top of the One Quote layout

Conditions for the button to be displayed:

The button is available at any stages without any visibility condition

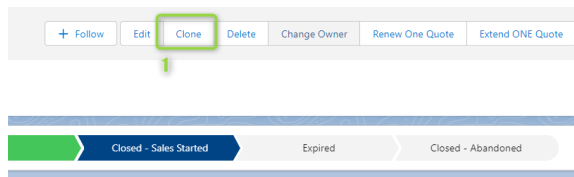
Cloning steps:

1. On the first screen we give the possibility to edit One Quote details
2. As we do for renewal we display optionally a second screen in the case there is one or more products not quotable anymore checking conditions below:
 - a. SLV44_Product_Level_5__r.SLV11_PRO_GBU__c = OneQuote__r.SLV44_GBU__c
 - b. SLV44_Product_Level_5__r.IsActive = True
 - c. SLV44_Product_Level_5__r."Allow product in Quote" = True
 - d. SLV44_Product_Level_4__c has an Active related "Region and Market Pricing" record ("Is active" = true on RMP object) for the same combination of OneQuote__r.SLV44_Pricing_Region__c (Region on RMP object) AND OneQuote__r.BU ("Market / BU" on RMP object).
 - e. SLV44_Product_Level_5__c as at least one related Manufacturing plant and Shipping plant stored at Material - Plant (SKU)
3. On the third step we display the list of all quotable products coming from the original One Quote and give the possibility to users to select them with a checkbox for OQLI's he wants to clone.
 - a. At this step we also checking if we are going to hear any errors at insert. If errors are triggered we give the possibility to users to edit individuals OQLI from this table.
 - b. If the user try to clone a OQLI with Price setting not active an error message is displayed as follow.




After confirming the Cloning with no errors :

1. Creation of the One Quote record updating the Status to Draft
2. Creation all selected OQLI's and link them to the cloned One Quote
3. Recalculation of all approval fields (approval statuses, approver roles, approvers), price guidance, Region and market pricing, volume bracket fields
4. We retrieve Manufacturing/Shipping plants if still available. If not available we follow the normal logic (auto populate if only one choice, if more than one choice keep them blank).
5. Population of the same Ship To, legal entity, Contractual Commitment as the One Quote parent.



6. Copy of the same estimated annual volume, incoterms, quoted price, rationale, description, Incoterm Details, Lead Time, MOQ, Special custiler information as the original.

a.

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7. Displaying of a success message: "Your quote has been successfully Cloned"
8. User redirection to the cloned quote