14. Transactional Pricing (Commitments)

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Managing Customer Needs

Objectives & Values

Transactional Pricing aims at reducing price dispersion amongst similar customers, and can be applied to most products.

Without transactional pricing, price increases are often focused on the same customers, with the risk of eventually losing them.

Integration with Quote

Sales Reps commit to prices at Account/Product level. The aim is to provide commitment information to Sales Reps when they quote : if the combination Account/Product of the quote match an active commitment, the committed price will be automatically displayed on the Quote layout to help the Sales Reps set their prices.

- Quote Creation for Recurrent Business

Table of content

- General Process from pVelocity to SFDC
- As a Sales Rep
- As a Product Manager
- As a pVelocity Admin in Salesforce

Managing Commitments in the CRM will help you by :

As a Sales Rep you can :

- View all the commitments on which you need to commit
- Commit for a price on an assigned commitment
- Commit again on a rejected commitment

As a Product Manager you can :

- View all the commitments you need to approve or reject
- Approve or Reject a commitment

As a pVelocity admin in Salesforce you can :

- Edit any commitment regardless of its status and if it frozen or not

Commitments Security

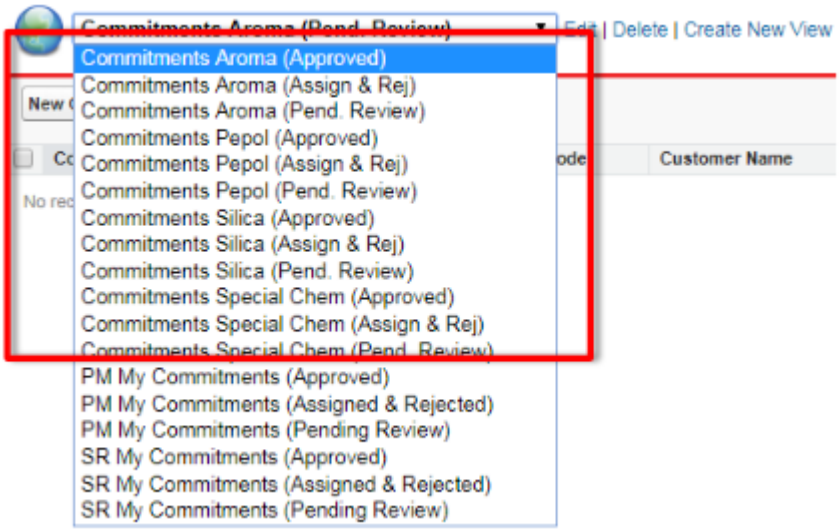
All profiles can only read and edit records (except Salesforce admins).

All fields are read only except :

- Reviewed Price
- Effective date
- Status
- is Contract
- Status of Negociation

Commitments Rules

Who can create?	Commitments are created by pVelocity No commitment is created directly in Salesforce
Who can see?	A commitment is visible by its owner, the related product manager (provided by pVelocity) Commitments can also be visible by the Sales Rep manager in the role hierarchy
Who can update?	A commitment can be updated by its owner, the related product manager (provided by pVelocity) Commitments can also be updated by the Sales Rep manager in the role hierarchy
Who can delete?	As pVelocity admins can't delete commitments directly, commitments are flagged to be deleted by pVelocity After that only System Administrators can delete them by DataLoader Commitment marked for deletion are no longer visible by non admin users Salesforce admins can delete Commitments at any time

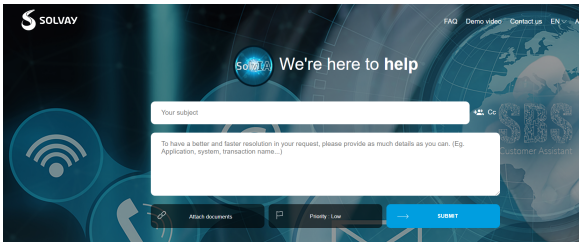
New List views on Commitment	
12 new list views have been created, to allow any user to access commitment. They are filtered on : • GBU • Status	

Related articles

- 04. Quotation

Need help?

To request any support or if you have identified a bug or incident , please create a Freshdesk ticket using Solvia platform : https://solvia.solvay.com/



you can copy users with email address , default priority is Low , then Submit . We advise you to put keywords in subject to ease dispatching to correct Agent : CRM - Complaint for example