Quote Creation Guidance

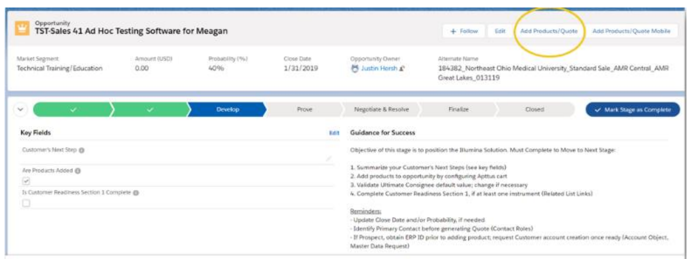
14/12/2021 – Diana Tanton

Purpose

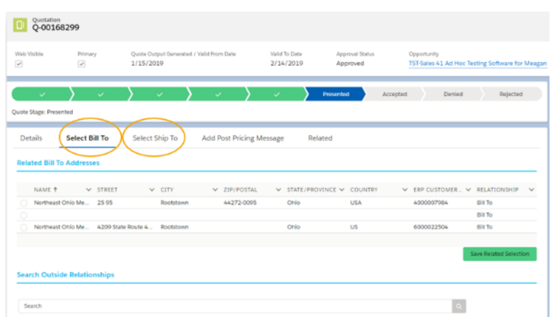
The following quick reference guide gives instructions on how to create a quote in Salesforce. This document applies to EMEA Commercial Operations.

1: Creating a New Quote Record (Add Products/ Quote)

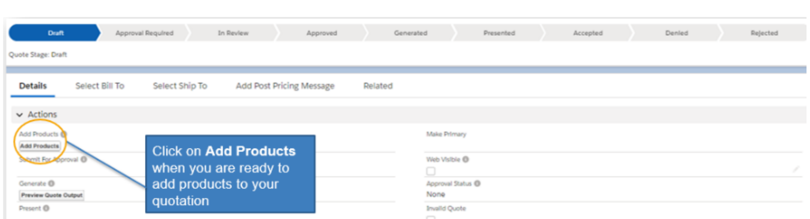
1. On the opportunity record, click **Add Products/Quote** on the top right-hand corner
    a. Note that this step creates the quotation record, you can find quotations you have created from the Opportunity Page, **Related List Quick Links**
    Tip: Avoid hitting the back button as this creates a new quotation record



2. Once on the newly created Quotation record,
    a. Select your Ship To
    b. Select your Bill To
    c. Click **Save** on each selection to save
    d. **Verify** that your selections saved by going to the Quotation Details



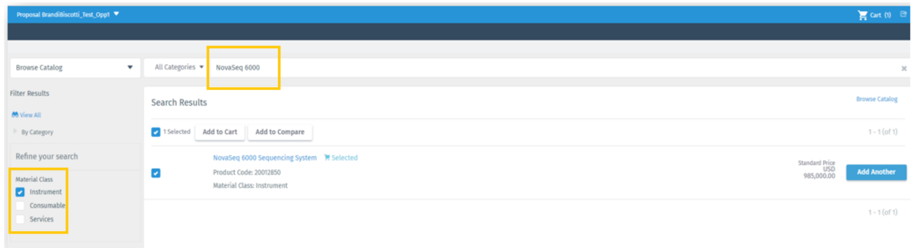
3. On the Quotation Details tab, click **Add Products** under the **Actions** section



2: Adding Products to your cart

4. Complete the following to add products and finalize cart:

a. Search for products and add to cart.
b. **To search**, use the search bar to type in the complete product description (i.e. NovaSeq System) and next refine your search by using the Material Class filter on the right-hand side
c. Use **Add to Cart** at line item level to add individual items or select multiple boxes and the **Add to Cart** that appears at the top to add multiple line items.

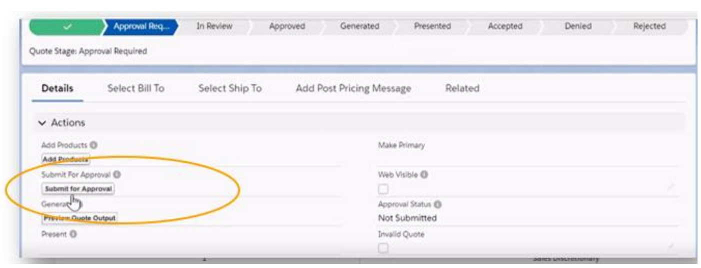


d. Click **Cart Icon** and **View Cart**
e. **Enter all line item details**, i.e. discount, quantity, shipping in close quarter totals, promotions, etc.
f. Click **Validate Cart** to validate pricing, promotions/discounts, regulatory compliance, etc.
g. Click **Finalize and Sync** to create quote record and sync product line item detail to the opportunity.

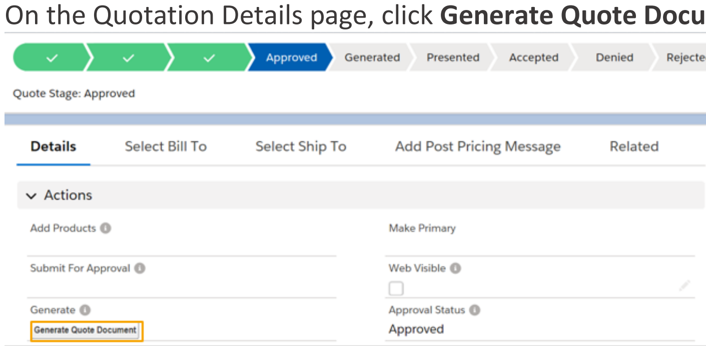
3: Submitting a Quote for Approval and Generating a Quotation Output

5. Select **Submit for Approval** in Actions section
   a. You will be prompted to enter **discount reason** and **discount justification** if sales discretionary discount applied
   b. Otherwise quote will be *automatically approved*

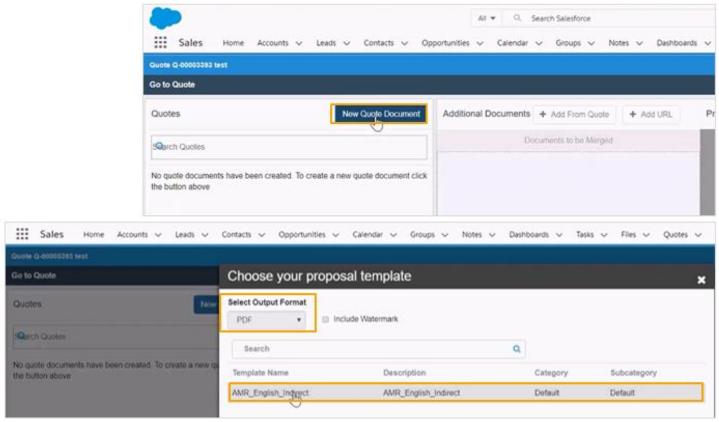
Tip: Refresh page if quotation does not progress in life cycle chevron



6. Complete the following to generate a copy of the quotation:
   a. On the Quotation Details page, click **Generate Quote Document** in **Actions** section



b. Click **New Quote Document**
c. Select template
d. Click **Generate**



7. Complete the following to present your quote (Send to Customer):
    a. To yourself:
        i. From the quotation generation page, select **Email**
        ii. Enter your email address in the **To** field and select **Send**
        iii. Click **Go to Quote** to return to the quotation page
        iv. Attach to your existing email chain and send to customer
    b. To a contact in Salesforce:
        i. From the Quotation Details page, select **Send Via Email**
        ii. Select attachment
        iii. Select **Next**
        iv. In the **To** field, search for a salesforce contact and enter email details
        v. Select **Send**
8. Click the opportunity link on the Quotation Details page to navigate back to the opportunity.
9. You will see the **“Are Products Added”** (Develop) and **Proposal Sent On** (Prove) exit criteria be populated