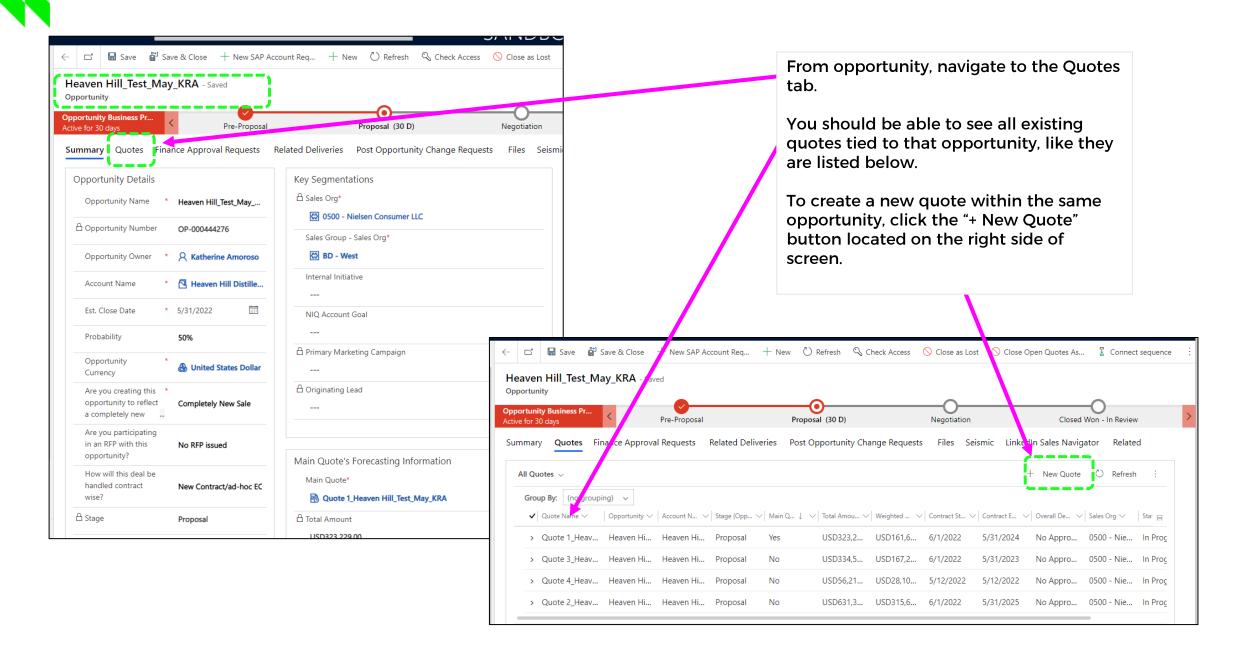
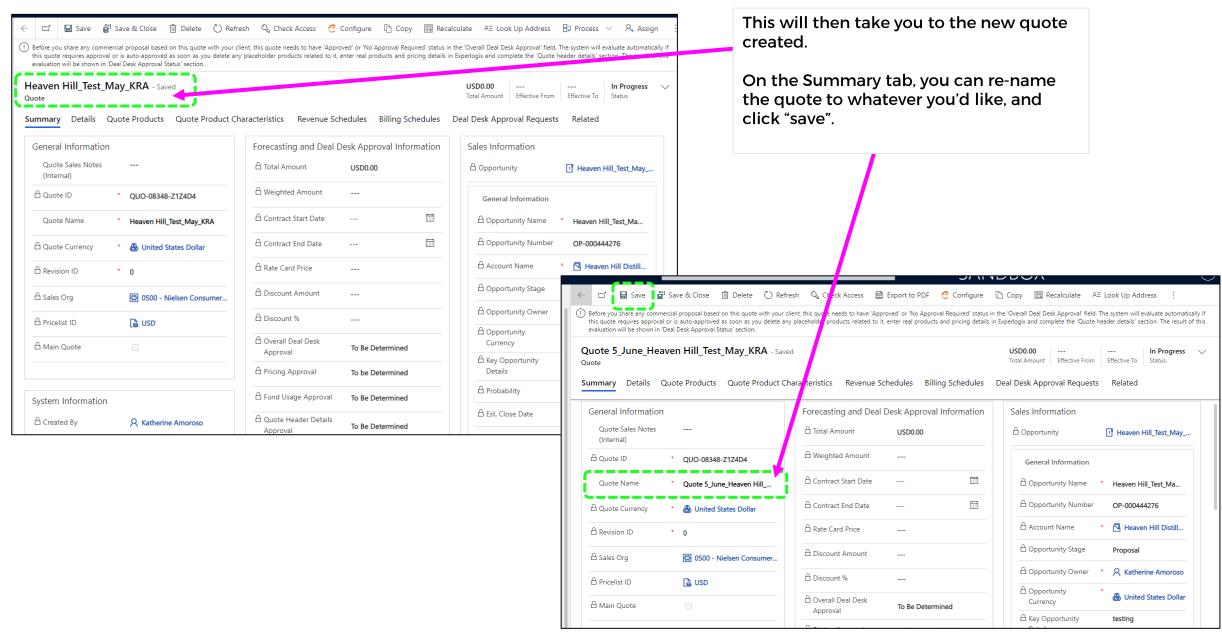
## Creating a new Quote in on an existing Opportunity

Step by step tutorial



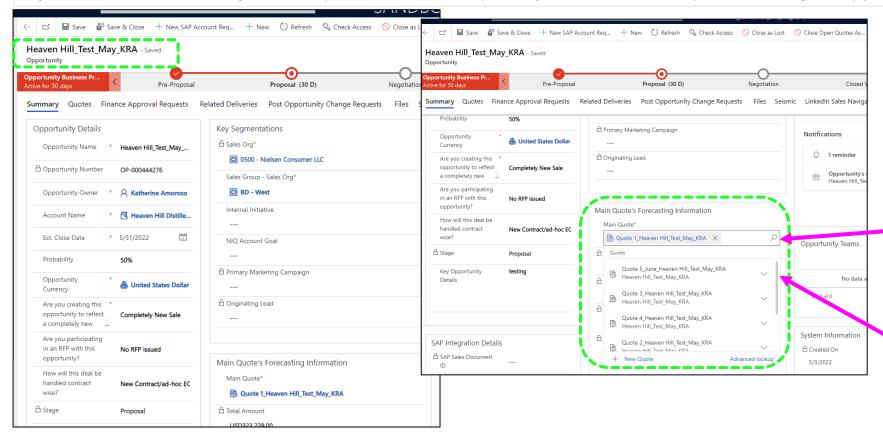


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Any subsequently created quote after the very first one created when the opportunity was opened will not be marked as the "main quote". The main quote should represent the most likely option the client will be moving forward with.

If you need to mark a newly created quote as the "main quote", you will need to migrate back to your opportunity.

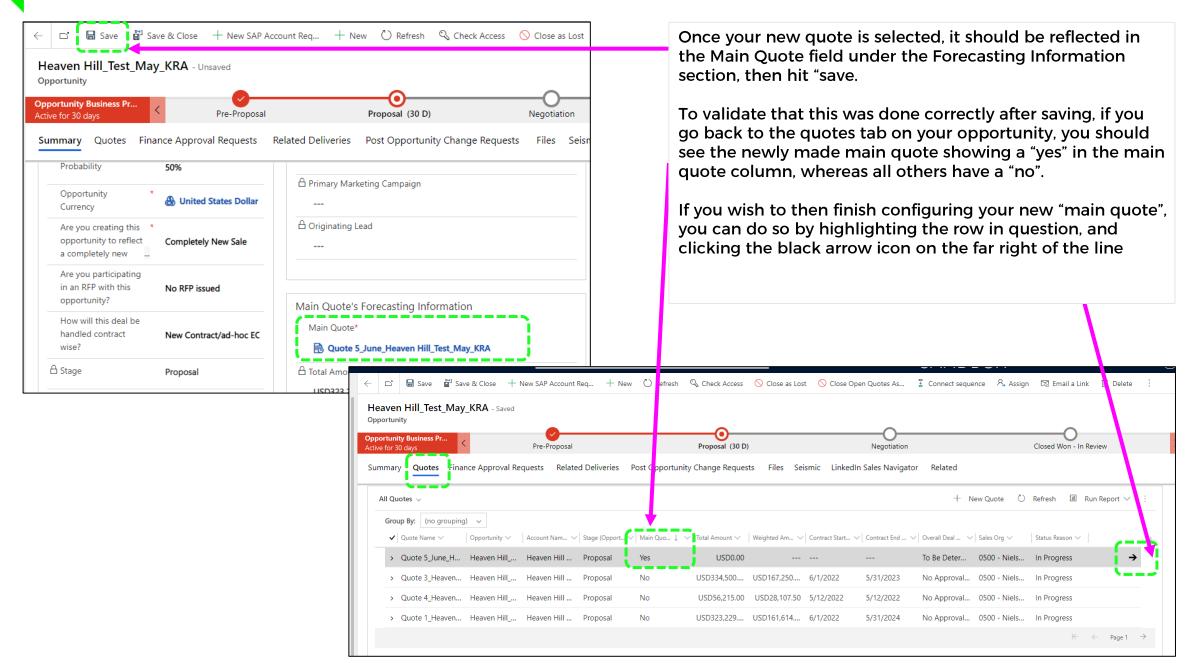


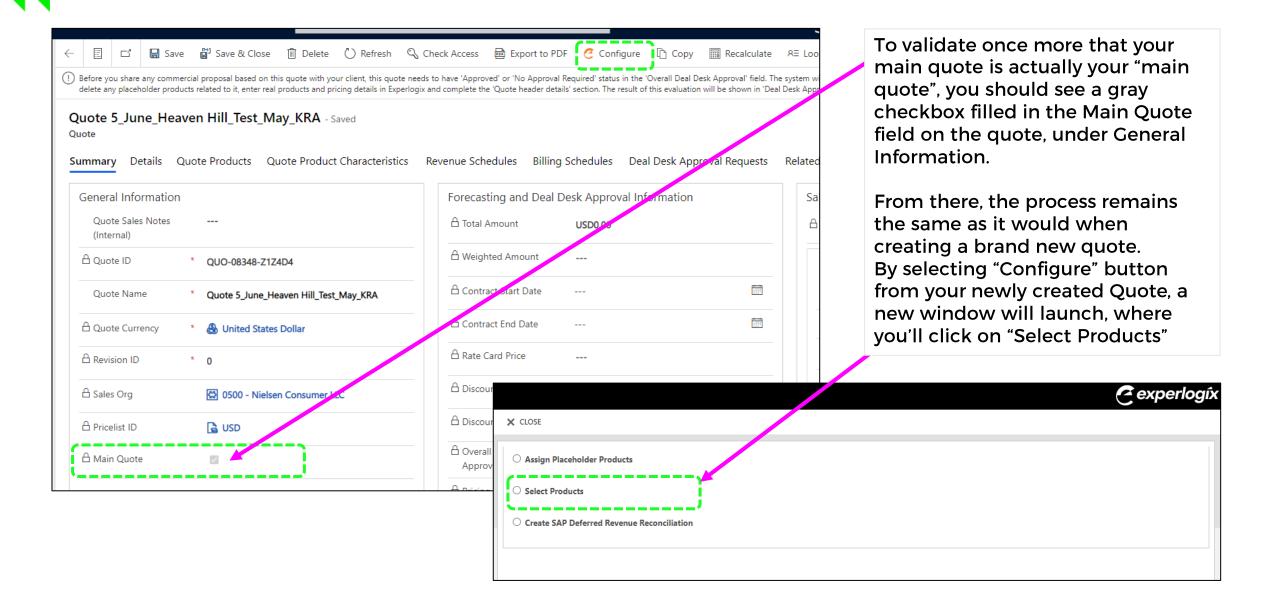
The quote currently designated as the "main quote" will be shown in the Main Quote's Forecasting Information, located in the center of the screen.

From there, you can click on the magnifying glass on the right hand side of the field, which should return all quotes tied to that opportunity.

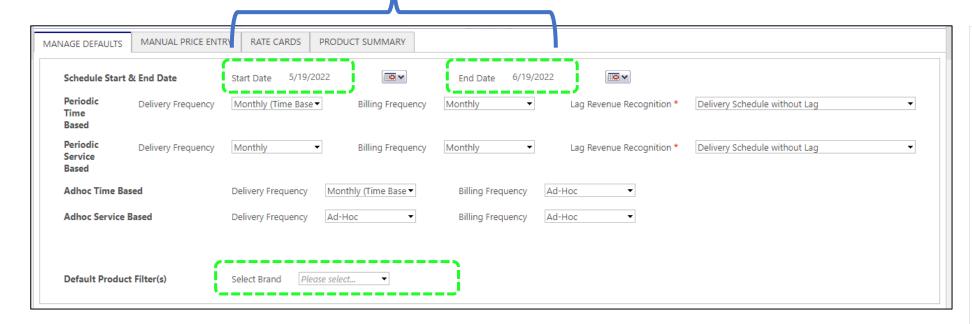
To change the main quote, you can simply select the quote from the drop down list, then hit save.

In this example, I want "Quote 5" to be my main quote moving forward.





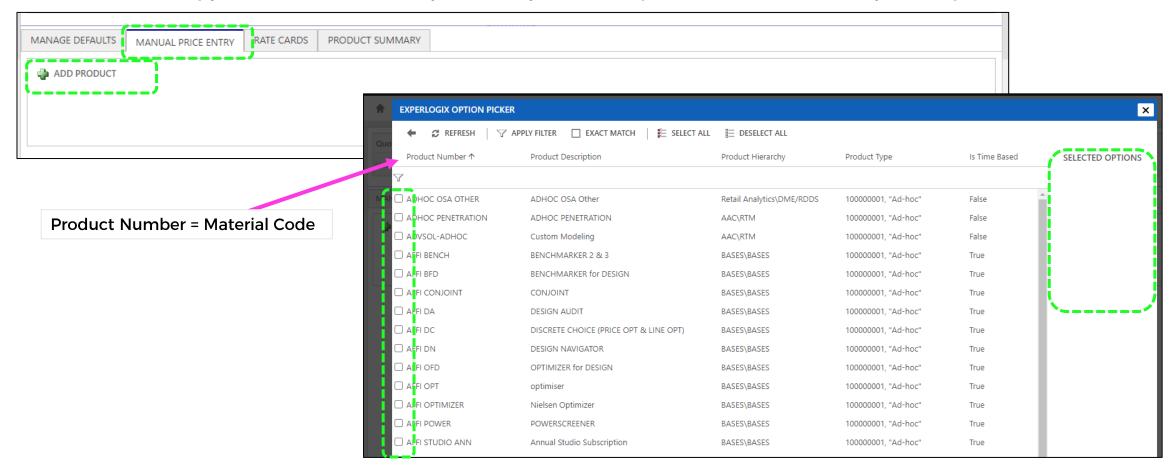
For Periodic Products, should select 1<sup>st</sup> of month as start date, and last day of month as End Date



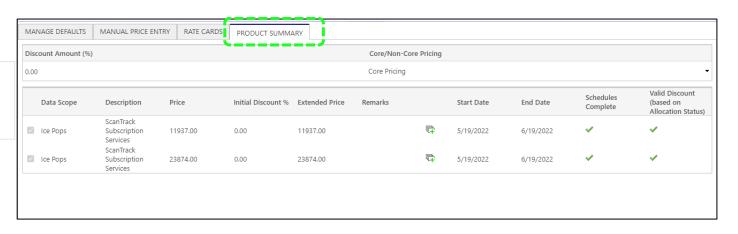
From the "Manage Defaults" tab, you'll be able to enter your start/end dates for your contract term, set any defaults related to delivery or billing frequency for the products you'll be configuring, as well as filter products by Brand or also Sub-Brand for results in your Manual Price Entry selections (formerly Product Picker).

The "Manual Price Entry" tab is where all products would be selected for pricing you've either done or been provided with from outside MSD.

Clicking the "Add Product" button will launch a separate window with all products available in your Sales Org. You're able to filter or search by portions of a product name or code, or page through should you wish to do so. Clicking in the white squares on the left hand of the window will add that product to your selected options. Once all have been selected, clicking the Save button (which will appear to the left of "Refresh") will bring you back to the tab, where you will see your selected products listed, and can add your charges.



Migrating to the Product Summary tab will show you all products you've configured in the quote, whether they be from a rate card, or manual price entry



For discount application, there are multiple options – either applying across all products utilizing the "Discount Amount %" field, applying at a line level, utilizing the "Initial Discount%" column, or a combination of both. Should you pass a discounting threshold set for your market, the "Pricing Approval Status" field in the header will change accordingly, and you'll be notified that approval will be necessary.

Selecting "Save and Close" will save your configuration and write back the details to MSD, where you can progress to Deal Desk for approval, if needed.

