

# Creating a new Quote in on an existing Opportunity

Step by step tutorial

Heaven Hill\_Test\_May\_KRA - Saved  
Opportunity

Opportunity Business Pr...  
Active for 30 days

Pre-Proposal

Proposal (30 D)

Negotiation

Summary Quotes Finance Approval Requests Related Deliveries Post Opportunity Change Requests Files Seismic

Opportunity Details

Opportunity Name \* Heaven Hill\_Test\_May\_...

Opportunity Number OP-000444276

Opportunity Owner \* Katherine Amoroso

Account Name \* Heaven Hill Distille...

Est. Close Date \* 5/31/2022

Probability 50%

Opportunity Currency \* United States Dollar

Are you creating this opportunity to reflect a completely new ... Completely New Sale

Are you participating in an RFP with this opportunity? No RFP issued

How will this deal be handled contract wise? New Contract/ad-hoc EC

Stage Proposal

Key Segmentations

Sales Org\* 0500 - Nielsen Consumer LLC

Sales Group - Sales Org\* BD - West

Internal Initiative ---

NIQ Account Goal ---

Primary Marketing Campaign ---

Originating Lead ---

Main Quote's Forecasting Information

Main Quote\* Quote 1\_Heaven Hill\_Test\_May\_KRA

Total Amount USD323,229.00

From opportunity, navigate to the Quotes tab.

You should be able to see all existing quotes tied to that opportunity, like they are listed below.

To create a new quote within the same opportunity, click the "+ New Quote" button located on the right side of screen.

Heaven Hill\_Test\_May\_KRA - Saved  
Opportunity

Opportunity Business Pr...  
Active for 30 days

Pre-Proposal

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Closed Won - In Review

Summary Quotes Finance Approval Requests Related Deliveries Post Opportunity Change Requests Files Seismic Linked In Sales Navigator Related

All Quotes

Group By: (no grouping)

Quote Name	Opportunity	Account N...	Stage (Opp...	Main Q...	Total Amou...	Weighted ...	Contract St...	Contract E...	Overall De...	Sales Org	Sta
> Quote 1_Heav...	Heaven Hi...	Heaven Hi...	Proposal	Yes	USD323,2...	USD161,6...	6/1/2022	5/31/2024	No Appro...	0500 - Nie...	In Prog
> Quote 3_Heav...	Heaven Hi...	Heaven Hi...	Proposal	No	USD334,5...	USD167,2...	6/1/2022	5/31/2023	No Appro...	0500 - Nie...	In Prog
> Quote 4_Heav...	Heaven Hi...	Heaven Hi...	Proposal	No	USD56,21...	USD28,10...	5/12/2022	5/12/2022	No Appro...	0500 - Nie...	In Prog
> Quote 2_Heav...	Heaven Hi...	Heaven Hi...	Proposal	No	USD631,3...	USD315,6...	6/1/2022	5/31/2025	No Appro...	0500 - Nie...	In Prog

← ↻ Save Save & Close Delete Refresh Check Access Configure Copy Recalculate Look Up Address Process Assign

Before you share any commercial proposal based on this quote with your client, this quote needs to have 'Approved' or 'No Approval Required' status in the 'Overall Deal Desk Approval' field. The system will evaluate automatically if this quote requires approval or is auto-approved as soon as you delete any placeholder products related to it, enter real products and pricing details in Experlogix and complete the 'Quote header details' section. The result of this evaluation will be shown in 'Deal Desk Approval Status' section.

**Heaven Hill\_Test\_May\_KRA** - Saved  
Quote

USD0.00 Total Amount --- Effective From --- Effective To In Progress Status

Summary Details Quote Products Quote Product Characteristics Revenue Schedules Billing Schedules Deal Desk Approval Requests Related

General Information

Quote Sales Notes (Internal) ---

Quote ID \* QUO-08348-Z1Z4D4

Quote Name \* **Heaven Hill\_Test\_May\_KRA**

Quote Currency \* United States Dollar

Revision ID \* 0

Sales Org 0500 - Nielsen Consumer...

Pricelist ID USD

Main Quote ☐

Forecasting and Deal Desk Approval Information

Total Amount USD0.00

Weighted Amount ---

Contract Start Date ---

Contract End Date ---

Rate Card Price ---

Discount Amount ---

Discount % ---

Overall Deal Desk Approval To Be Determined

Pricing Approval To be Determined

Fund Usage Approval To Be Determined

Quote Header Details Approval To Be Determined

Sales Information

Opportunity Heaven Hill\_Test\_May\_...

General Information

Opportunity Name \* Heaven Hill\_Test\_Ma...

Opportunity Number OP-000444276

Account Name \* Heaven Hill Distill...

Opportunity Stage

Opportunity Owner

Opportunity Currency

Key Opportunity Details

Probability

Est. Close Date

System Information

Created By Katherine Amoroso

This will then take you to the new quote created.

On the Summary tab, you can re-name the quote to whatever you'd like, and click "save".

← ↻ Save Save & Close Delete Refresh Check Access Export to PDF Configure Copy Recalculate Look Up Address

Before you share any commercial proposal based on this quote with your client, this quote needs to have 'Approved' or 'No Approval Required' status in the 'Overall Deal Desk Approval' field. The system will evaluate automatically if this quote requires approval or is auto-approved as soon as you delete any placeholder products related to it, enter real products and pricing details in Experlogix and complete the 'Quote header details' section. The result of this evaluation will be shown in 'Deal Desk Approval Status' section.

**Quote 5\_June\_Heaven Hill\_Test\_May\_KRA** - Saved  
Quote

USD0.00 Total Amount --- Effective From --- Effective To In Progress Status

Summary Details Quote Products Quote Product Characteristics Revenue Schedules Billing Schedules Deal Desk Approval Requests Related

General Information

Quote Sales Notes (Internal) ---

Quote ID \* QUO-08348-Z1Z4D4

Quote Name \* **Quote 5\_June\_Heaven Hill\_...**

Quote Currency \* United States Dollar

Revision ID \* 0

Sales Org 0500 - Nielsen Consumer...

Pricelist ID USD

Main Quote ☐

Forecasting and Deal Desk Approval Information

Total Amount USD0.00

Weighted Amount ---

Contract Start Date ---

Contract End Date ---

Rate Card Price ---

Discount Amount ---

Discount % ---

Overall Deal Desk Approval To Be Determined

Sales Information

Opportunity Heaven Hill\_Test\_May\_...

General Information

Opportunity Name \* Heaven Hill\_Test\_Ma...

Opportunity Number OP-000444276

Account Name \* Heaven Hill Distill...

Opportunity Stage Proposal

Opportunity Owner \* Katherine Amoroso

Opportunity Currency \* United States Dollar

Key Opportunity testing

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 screenshot displays the SAP CRM interface for the opportunity 'Heaven Hill\_Test\_May\_KRA'. The interface is divided into several sections: Opportunity Details, Key Segmentations, Main Quote's Forecasting Information, and SAP Integration Details. The 'Main Quote's Forecasting Information' section is highlighted with a green dashed box, showing a list of quotes with a magnifying glass icon on the right. A pink arrow points to this magnifying glass. The 'Main Quote' field is currently set to 'Quote 1\_Heaven Hill\_Test\_May\_KRA'. The 'SAP Integration Details' section shows the 'SAP Sales Document ID' as '---'.

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.

← Save Save & Close + New SAP Account Req... + New Refresh Check Access Close as Lost

Heaven Hill\_Test\_May\_KRA - Unsaved  
Opportunity

Opportunity Business Pr... Active for 30 days

Pre-Proposal Proposal (30 D) Negotiation

Summary Quotes Finance Approval Requests Related Deliveries Post Opportunity Change Requests Files Seism

Probability 50%

Opportunity Currency \* United States Dollar

Are you creating this opportunity to reflect a completely new \* Completely New Sale

Are you participating in an RFP with this opportunity? No RFP issued

How will this deal be handled contract wise? New Contract/ad-hoc EC

Stage Proposal

Primary Marketing Campaign ---

Originating Lead ---

Main Quote's Forecasting Information

Main Quote\* Quote 5\_June\_Heaven Hill\_Test\_May\_KRA

Total Amo USD323...

Once your new quote is selected, it should be reflected in the Main Quote field under the Forecasting Information section, then hit "save."

To validate that this was done correctly after saving, if you go back to the quotes tab on your opportunity, you should see the newly made main quote showing a "yes" in the main quote column, whereas all others have a "no".

If you wish to then finish configuring your new "main quote", you can do so by highlighting the row in question, and clicking the black arrow icon on the far right of the line

← Save Save & Close + New SAP Account Req... + New Refresh Check Access Close as Lost Close Open Quotes As... Connect sequence Assign Email a Link Delete

Heaven Hill\_Test\_May\_KRA - Saved  
Opportunity

Opportunity Business Pr... Active for 30 days

Pre-Proposal Proposal (30 D) Negotiation Closed Won - In Review

Summary Quotes Finance Approval Requests Related Deliveries Post Opportunity Change Requests Files Seismic LinkedIn Sales Navigator Related

All Quotes + New Quote Refresh Run Report

Group By: (no grouping)

✓	Quote Name	Opportunity	Account Nam...	Stage (Opport...	Main Quo...	Total Amount	Weighted Am...	Contract Start...	Contract End ...	Overall Deal ...	Sales Org	Status Reason	
>	Quote 5_June_H...	Heaven Hill_...	Heaven Hill ...	Proposal	Yes	USD0.00	---	---	---	To Be Deter...	0500 - Niels...	In Progress	→
>	Quote 3_Heaven...	Heaven Hill_...	Heaven Hill ...	Proposal	No	USD334,500...	USD167,250...	6/1/2022	5/31/2023	No Approval...	0500 - Niels...	In Progress	
>	Quote 4_Heaven...	Heaven Hill_...	Heaven Hill ...	Proposal	No	USD56,215.00	USD28,107.50	5/12/2022	5/12/2022	No Approval...	0500 - Niels...	In Progress	
>	Quote 1_Heaven...	Heaven Hill_...	Heaven Hill ...	Proposal	No	USD323,229...	USD161,614...	6/1/2022	5/31/2024	No Approval...	0500 - Niels...	In Progress	

Page 1

Before you share any commercial proposal based on this quote with your client, this quote needs to have 'Approved' or 'No Approval Required' status in the 'Overall Deal Desk Approval' field. The system will delete any placeholder products related to it, enter real products and pricing details in Experlogix and complete the 'Quote header details' section. The result of this evaluation will be shown in 'Deal Desk Approval'.

### Quote 5\_June\_Heaven Hill\_Test\_May\_KRA - Saved

Quote

**Summary** Details Quote Products Quote Product Characteristics Revenue Schedules Billing Schedules Deal Desk Approval Requests Related

#### General Information

Quote Sales Notes (Internal)	---
Quote ID	* QUO-08348-Z1Z4D4
Quote Name	* Quote 5_June_Heaven Hill_Test_May_KRA
Quote Currency	* United States Dollar
Revision ID	* 0
Sales Org	0500 - Nielsen Consumer LLC
Pricelist ID	USD
Main Quote	<input checked="" type="checkbox"/>

#### Forecasting and Deal Desk Approval Information

Total Amount	USD0.00
Weighted Amount	---
Contract Start Date	---
Contract End Date	---
Rate Card Price	---
Discount	
Discount	
Overall Approval	
Price	

To validate once more that your main quote is actually your “main quote”, you should see a gray checkbox filled in the Main Quote field on the quote, under General Information.

From there, the process remains the same as it would when creating a brand new quote. By selecting “Configure” button from your newly created Quote, a new window will launch, where you’ll click on “Select Products”

×

CLOSE

☐ Assign Placeholder Products

☒ Select Products

☐ Create SAP Deferred Revenue Reconciliation

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

MANAGE DEFAULTS | MANUAL PRICE ENTRY | RATE CARDS | PRODUCT SUMMARY

**Schedule Start & End Date**

Start Date 5/19/2022 End Date 6/19/2022

**Periodic Time Based**

Delivery Frequency Monthly (Time Base) Billing Frequency Monthly Lag Revenue Recognition \* Delivery Schedule without Lag

**Periodic Service Based**

Delivery Frequency Monthly Billing Frequency Monthly Lag Revenue Recognition \* Delivery Schedule without Lag

**Adhoc Time Based**

Delivery Frequency Monthly (Time Base) Billing Frequency Ad-Hoc

**Adhoc Service Based**

Delivery Frequency Ad-Hoc Billing Frequency Ad-Hoc

**Default Product Filter(s)**

Select Brand Please select...

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.

MANAGE DEFAULTS

MANUAL PRICE ENTRY

RATE CARDS

PRODUCT SUMMARY

+

ADD PRODUCT

EXPERLOGIX OPTION PICKER

← REFRESH | 🔍 APPLY FILTER | ☐ EXACT MATCH | 📋 SELECT ALL | 🗑️ DESELECT ALL

Product Number ↑	Product Description	Product Hierarchy	Product Type	Is Time Based	SELECTED OPTIONS
<input type="checkbox"/> ADHOC OSA OTHER	ADHOC OSA Other	Retail Analytics\DME/RDDS	100000001, "Ad-hoc"	False	
<input type="checkbox"/> ADHOC PENETRATION	ADHOC PENETRATION	AAC\RTM	100000001, "Ad-hoc"	False	
<input type="checkbox"/> ADVSOL-ADHOC	Custom Modeling	AAC\RTM	100000001, "Ad-hoc"	False	
<input type="checkbox"/> AFFI BENCH	BENCHMARKER 2 & 3	BASES\BASES	100000001, "Ad-hoc"	True	
<input type="checkbox"/> AFFI BFD	BENCHMARKER for DESIGN	BASES\BASES	100000001, "Ad-hoc"	True	
<input type="checkbox"/> AFFI CONJOINT	CONJOINT	BASES\BASES	100000001, "Ad-hoc"	True	
<input type="checkbox"/> AFFI DA	DESIGN AUDIT	BASES\BASES	100000001, "Ad-hoc"	True	
<input type="checkbox"/> AFFI DC	DISCRETE CHOICE (PRICE OPT & LINE OPT)	BASES\BASES	100000001, "Ad-hoc"	True	
<input type="checkbox"/> AFFI DN	DESIGN NAVIGATOR	BASES\BASES	100000001, "Ad-hoc"	True	
<input type="checkbox"/> AFFI OFD	OPTIMIZER for DESIGN	BASES\BASES	100000001, "Ad-hoc"	True	
<input type="checkbox"/> AFFI OPT	optimiser	BASES\BASES	100000001, "Ad-hoc"	True	
<input type="checkbox"/> AFFI OPTIMIZER	Nielsen Optimizer	BASES\BASES	100000001, "Ad-hoc"	True	
<input type="checkbox"/> AFFI POWER	POWERSCREENER	BASES\BASES	100000001, "Ad-hoc"	True	
<input type="checkbox"/> AFFI STUDIO ANN	Annual Studio Subscription	BASES\BASES	100000001, "Ad-hoc"	True	

Product Number = Material Code



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

MANAGE DEFAULTS   MANUAL PRICE ENTRY   RATE CARDS <b>PRODUCT SUMMARY</b>									
Discount Amount (%)		Core/Non-Core Pricing							
0.00		Core Pricing							
Data Scope	Description	Price	Initial Discount %	Extended Price	Remarks	Start Date	End Date	Schedules Complete	Valid Discount (based on Allocation Status)
<input checked="" type="checkbox"/> Ice Pops	ScanTrack Subscription Services	11937.00	0.00	11937.00		5/19/2022	6/19/2022	✓	✓
<input checked="" type="checkbox"/> Ice Pops	ScanTrack Subscription Services	23874.00	0.00	23874.00		5/19/2022	6/19/2022	✓	✓

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.

**SAVE AND CLOSE**
**CLOSE**
**VALIDATE**

Quote Type: New Sale
Contract Start Date: 6/1/2022
Contract End Date: 6/1/2023
Pricing Approval Status: **Approval Required**
Funds Approval Status: No Approval Required

MANAGE DEFAULTS   MANUAL PRICE ENTRY   RATE CARDS   **PRODUCT SUMMARY**

Discount Amount (%): 10.00

Data Scope	Description	Price	Initial Discount %	Extended Price	Remarks	Start Date	End Date	Schedules Complete	Valid Discount (based on Allocation Status)
<input checked="" type="checkbox"/> Ice Pops	ScanTrack Subscription Services	11937.00	10.00	10743.30		6/1/2022	6/1/2023	✓	✓
<input checked="" type="checkbox"/> Ice Pops	ScanTrack Subscription Services	23874.00	10.00	21486.60		6/1/2022	6/1/2023	✓	✓

**GENERAL INFORMATION**

The total discount has exceeded the established thresholds; Pricing Approval is required.