

Building and Accessing a Quote Using Fiori Sales App

Introduction

The Fiori Sale App (FSA) is a product of SAP. It is an online application that interfaces with the order management system for Discount Tire.

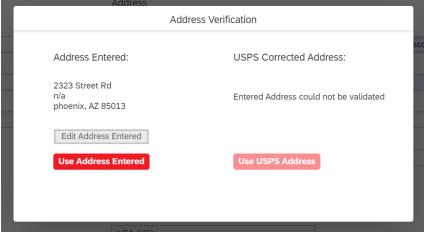
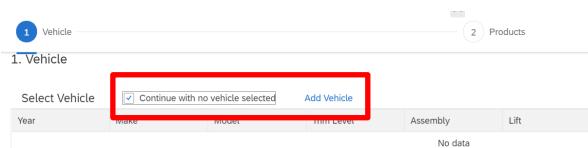
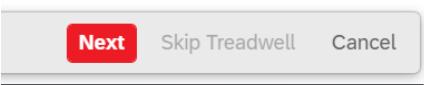
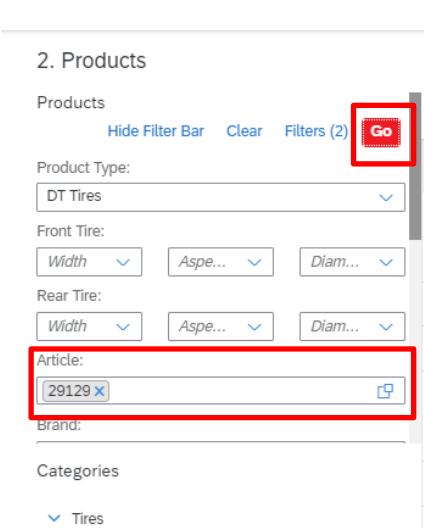
Purpose

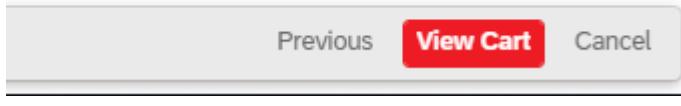
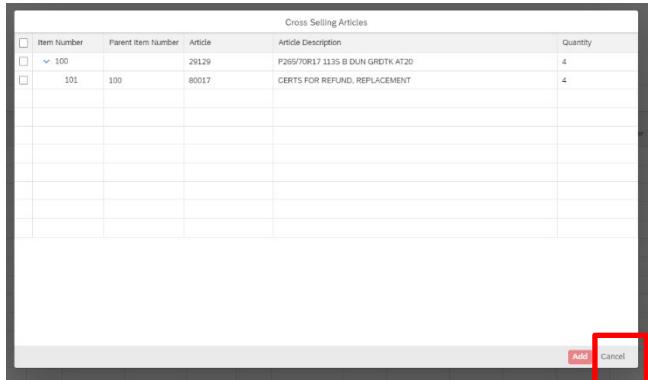
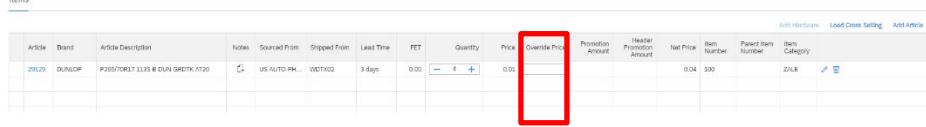
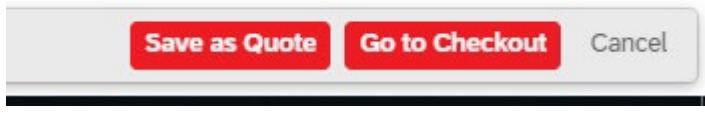
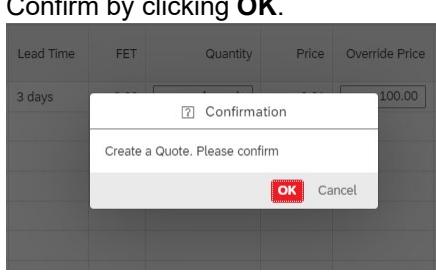
The purpose of this document is to guide employees with building and accessing quotes using the Fiori Sales App (FSA).

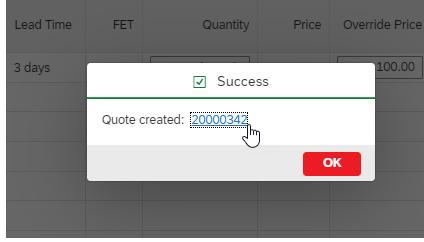
Follow these steps to build a quote using FSA:

Building a Quote

Step	Action
1	Click on the Manage Customers tile.
2	If this is an existing customer, you can search by entering customer first name, last name, and/or phone number. Then click Go . If this is a new customer, click Create Customer , then enter the required information.
3	Enter Customer Information in the required fields. At this point, you can choose to add vehicle information, if known.
4	Click Create .

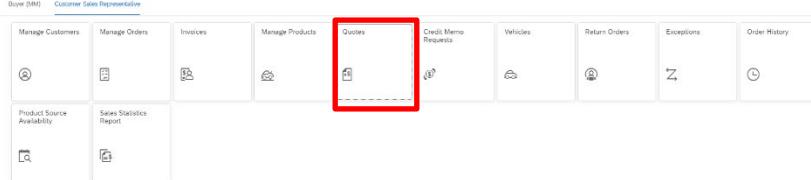
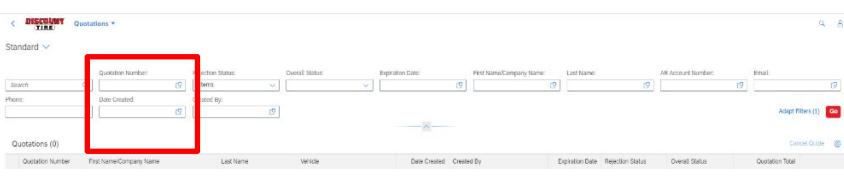
5	<p>Verify mailing address.</p> 
6	<p>Click Create Order in the upper right.</p> <p>Each quote will begin by creating an order and will end prior to checkout.</p> 
7	<p>Click Continue with no vehicle selected.</p> <p>Vehicle information is not required to build a quote. If you would like to enter vehicle information, click Add Vehicle.</p>  <p>Note: If vehicle added here, it is a temporary add and will not be persisted on the customer profile. Vehicles added during customer create or from the customer profile/vehicles tab will be persisted on the customer profile.</p>
8	<p>Click Next in the lower right corner.</p> 
9	<p>Enter search info on the left to find product for the customer, then click Go.</p> 

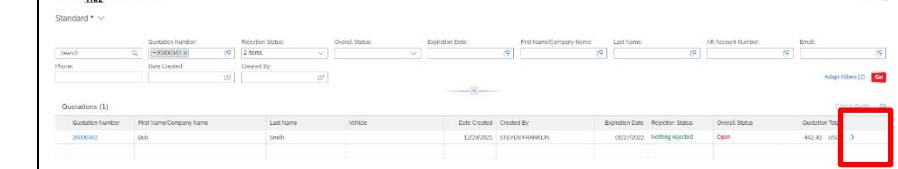
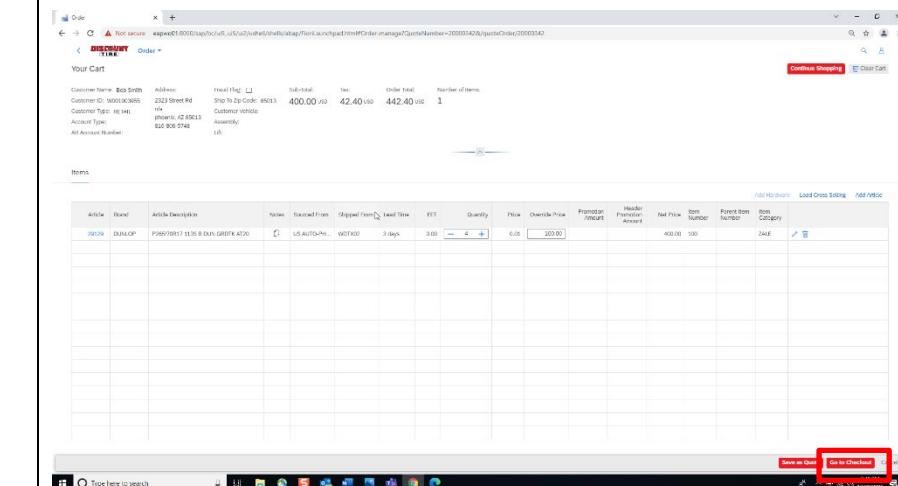
10	<p>When the product displays, add to cart by clicking the cart icon on the right.</p> 
11	<p>Then click View Cart in the lower right corner.</p> 
12	<p>You will be prompted to add Cross Selling Articles, such as certificates. This is not necessary when building a quote. Click Cancel.</p> 
13	<p>Enter the modified price into the Override Price field.</p> 
14	<p>Click Save as Quote in the lower right corner.</p> 
15	<p>Confirm by clicking OK.</p> 

16	<p>Once created, you will be provided with a quote number. Click on the quote number to view the quote.</p> 
17	<p>Review the details with the customer to verify that all information entered is correct.</p> <p>Provide the quote number to the customer for reference when they are ready to purchase.</p> <p>Once created, an agent can process an order from that quote for up to 30 days</p> 

Accessing a Quote (Option 1)

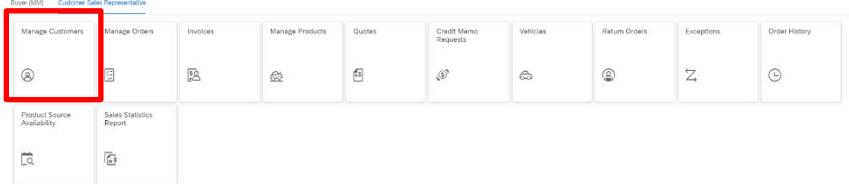
Follow these steps to access a quote using the Quotes tile.

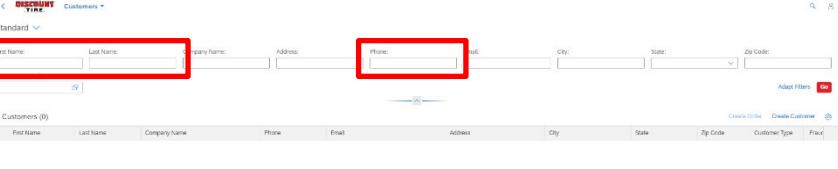
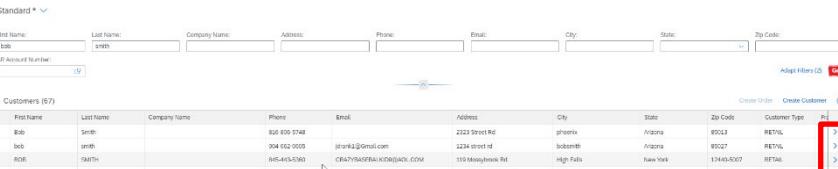
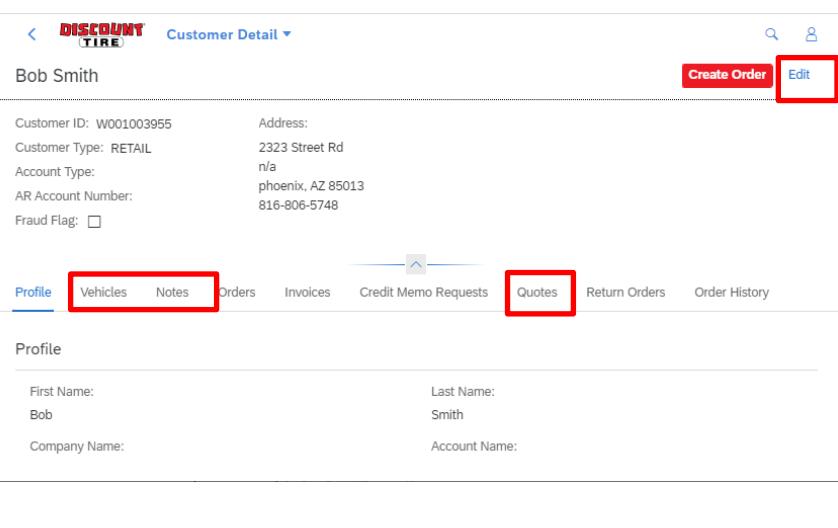
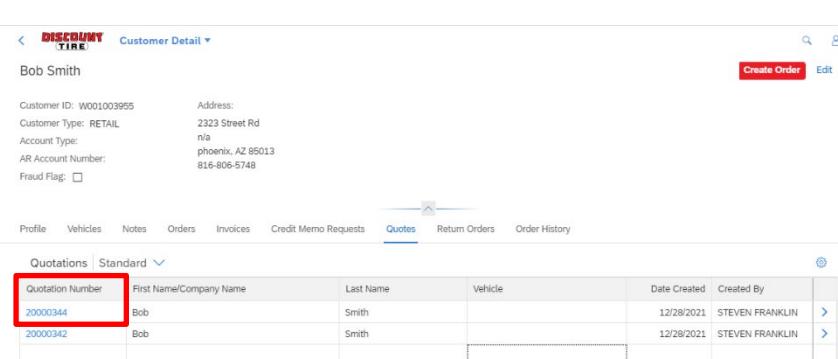
Step	Action
1	<p>Click on the Quotes tile on the dashboard.</p> 
2	<p>Enter the quote number provided by the customer in the Quotation Number field.</p> <p>If the quote number is unknown, you can choose to search by customer name or by the date the quote was created.</p> 

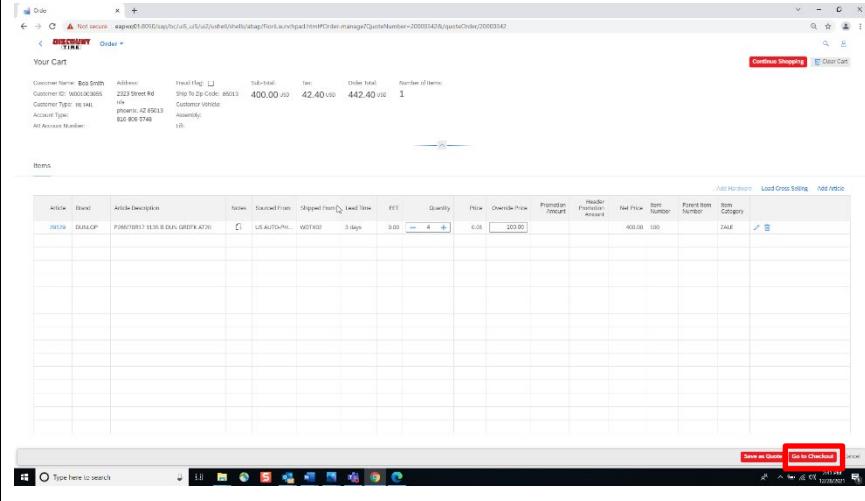
3	<p>Click Go.</p> <p>Adapt Filters (2) Go</p>
4	<p>Once the quote is located, view details by clicking the chevron on the right.</p> 
5	<p>Click Create Order from Quote.</p> <p>Create Order From Quote</p>
6	<p>If the information is correct, click Go to Checkout to complete the sale.</p> <p>Note: You may need to go to the Customer Profile and enter vehicle information if it was not entered at the time the quote was created (see to Option 2).</p> 

Accessing a Quote (Option 2)

Follow these steps to access a quote using the Manage Customers tile:

Step	Action
1	<p>Click on the Manage Customers tile.</p> 

2	<p>Enter customer's first name, last name, and/or phone number to search. Then click Go.</p> 
3	<p>Select the customer from the list provided by clicking the chevron on the right.</p> 
4	<p>From the Customer Detail screen, you can:</p> <ul style="list-style-type: none"> • Edit the customer's profile information by clicking Edit • Enter notes by clicking the Notes tab • Enter vehicle information by clicking the Vehicle tab • Access the quote by selecting the Quotes tab 
5	<p>After clicking the Quotes tab, select the quote by clicking on the quotation number.</p> 

6	<p>Click Create Order from Quote.</p> 
7	<p>Click Go to Checkout to complete the sale.</p> 

Contact

Contact the Service Desk at support@discounttire.com or 800-366-4399.