

Customer validation and Follow up

Overview

In this section, you will find information about the customer validation process for the quote, as well as how to use Chatter to follow up the quote.

Concerned profiles:

ALL

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Step By Step

Customer validation process

Most of the time, the customer agreement is received by email or phone. The sales rep will then have to update the Quote status and put an accepted or denied value.

Quote Q-000000024

Customize Page | Edit Layout | Printable View

Show Feed

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Quote Line Items (4) | Activity History (2) | Google Docs, Notes, & Attachments (2) | Approval History (2) | Open Activities (2) | Quote History (1)

Quote Detail [Save] [Cancel]

Information

| | | | |
|-----------------|-----------------------------|----------|---------------------|
| Quote Name | Q-000000024 | Owner | XXXXXXXXXX (Change) |
| Opportunity | Opp Les Aristochats Quote 2 | Status | Denied |
| Visibility | | Currency | |
| GBU | Novecare | CSR | |
| BU | | Back Up | |
| Expiration date | | | |



If the Quote is rejected, the sales representative then denied value in the test at this field and the process ends. If the Quote

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ication of the sales representative when a number is created for a specific Quote can be done by the CSR through notes or

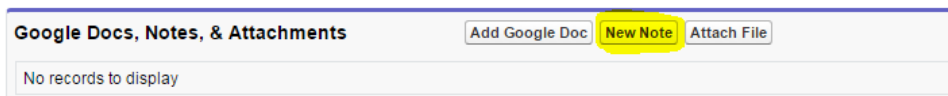
chatter if needed.

Follow up tools

The CSR has multiple ways to update the salesrep regarding the order creation in SAP

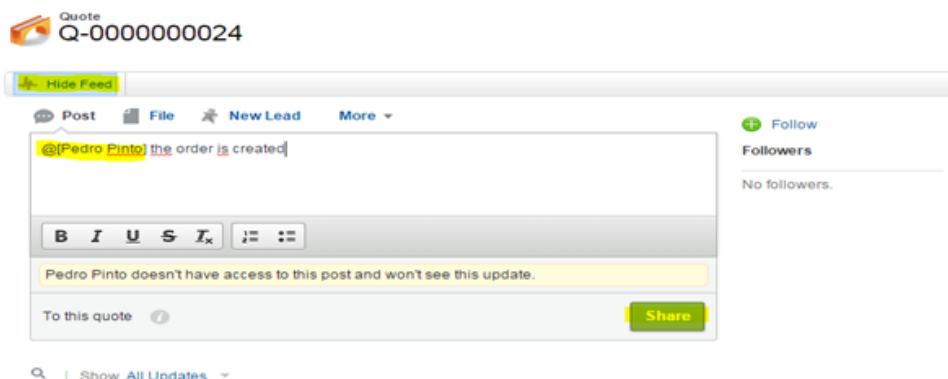
He can use notes or chatter.

Notes are in the quote related list, but no automatic notification will go to the salesrep.



Otherwise the CSR can use the chatter feed on top of the quote page:

By writing @SalesrepName the salesrep will automatically receive an email notification.



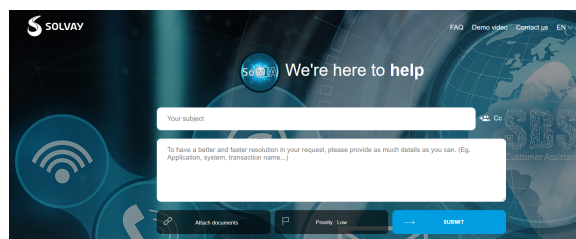
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Related articles

- [Quote creation from a Recurrent Business Opportunity.](#)
- [Quote Creation from a Growth Business Opportunity.](#)
- [Quote Mass Clone](#)
- [Quote Mass Update](#)
- [Quote Manual Sharing](#)
- [Quote Approval Process](#)
- [Quote communication](#)
- [Quote Email Template creation](#)
- [Create a New Opportunity](#)
- [Clone an Existing Opportunity](#)
- [Definitions, Types of Opportunities & Process](#)

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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