

# Quote Approval Process

## Overview

In this section, you will find information about the approval process for a quote.

Concerned profiles:

ALL

## Step By Step

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The sales rep can submit the quote for approval if an approval for the price or volume is needed.

This step is not mandatory in the quote process. It will not be blocking the PDF generation or sending of the quote to the customer.

If needed the user clicks on **Submit for approval**

The screenshot shows the 'Quote Edit' interface. At the top, there are buttons for 'Save', 'Save & New', and 'Cancel'. Below this is the 'Information' section, which includes fields for Quote Name (Q-0000000361), Opportunity (alca), Quote Title (alca), Visibility (GBU Restricted), GBU (Soda Ash & Derivatives), BU (Soda Ash), Expiration date (30/11/2016), and Legal Quote Header. On the right side, there are fields for Owner (Françoise Cousy), Status (Draft), Currency (EUR - Euro), and Customer Service Representative (Anne Gilles). A red box highlights the 'Comments for the Approval' field.

### Approval History

Submit for Approval

No records to display



T h e s a l e s r e p w i l l h a v e t o s e l e c t h i s m a n a g e r t o a p p r o v e o r a u s e r t h a t h a s v i s i b i l i t y o n t h e q u o t e .

Send to Next Approver Cancel

This record requires additional approval. The name of the next step is Manual  
Your administrator has specified that you must manually choose who the next approver should be. Specify a user or queue in the box below, then click Send to Next Approver.

Next Approver User

2 Once selected, the salesrep will click send to next approver

[Send to Next Approver](#) [Cancel](#)

This record requires additional approval. The name of the next step is Manual

Your administrator has specified that you must manually choose who the next approver should be. Specify a user or queue in the box below, then click Send to Next Approver.

Next Approver User

3 Then, the approver's name will appear in the approval history of the quote with the pending status

[Recall Approval Request](#) [Approval History Help ?](#)

Action	Date	Status	Assigned To	Actual Approver	Comments	Overall Status
<b>Step: Request Approval (Pending for first approval)</b>						
Reassign   Approve / Reject	16/12/2015 16:25	Pending	<a href="#">Geoffray Atlan</a>	<a href="#">Geoffray Atlan</a>		Pending
<b>Approval Request Submitted</b>						

4 When the quote is submitted for approval, no modification is allowed. So if the salesrep needs to modify data he can recall the approval request and update information before submitting it again.

[Recall Approval Request](#) [Approval History Help ?](#)

Action	Date	Status	Assigned To	Actual Approver	Comments	Overall Status
<b>Step: Manual (Pending for first approval)</b>						
Reassign   Approve / Reject	19/01/2016 17:13	Pending	<a href="#">Yasmina Fares</a>	<a href="#">Yasmina Fares</a>		Pending

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**Recall Approval Request** [Recall Approval Request](#) [Cancel](#)

Related To [S-0000018](#) Created By [Geoffray Atlan](#)

Comments

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[Submit for Approval](#) [Approval History Help ?](#)

Action	Date	Status	Assigned To	Actual Approver	Comments	Overall Status
<b>Approval Request Recalled</b>						
	20/01/2016 9:56	Recalled	<a href="#">Yasmina Fares</a>	<a href="#">Geoffray Atlan</a>	The Quality has changed	Recalled

5 The actions available for the approver are:

[Manage All](#)

Action	Related To	Type
Reassign   Approve / Reject	<a href="#">S-0000018</a>	Sample Request

- Reassign the request
- Approve the request
- Reject the request

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When the user will click on approve / reject link he will see the following page where he will have to add comments and click approve.

**Approve/Reject Approval Request**

Quote Name: Q-000000043  
Owner: [Geoffrey Atlan](#)  
Price Validity from: 14/12/2015  
Price Validity to: 2/01/2016  
Quotation Expiration date: 14/12/2015

Comments

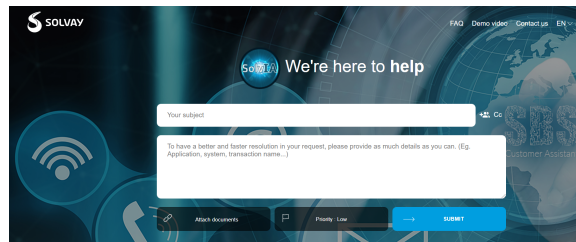
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## Related articles

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

## Need help?

To request any support or if you have identified a bug or incident , please create a Freshdesk ticket using Solvia platform : <https://solvia.solvay.com/>



*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*