Quote Approval Process

Overview

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

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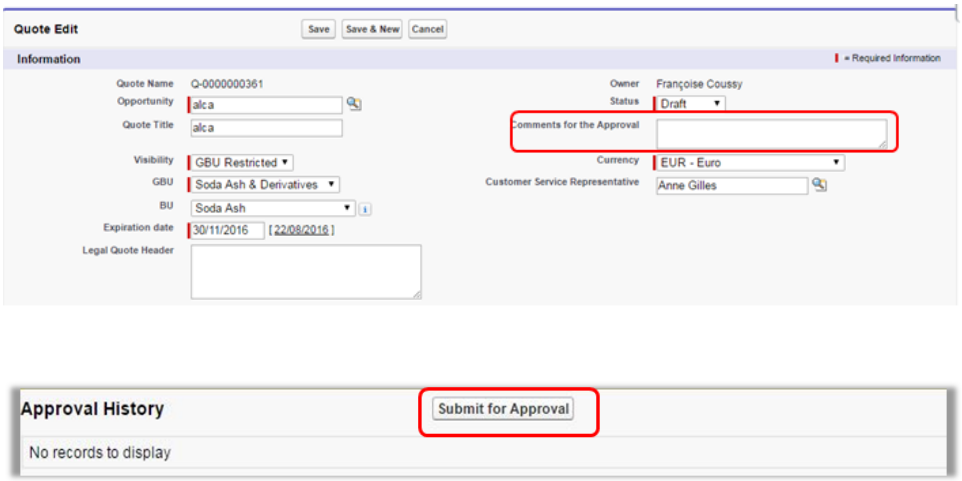
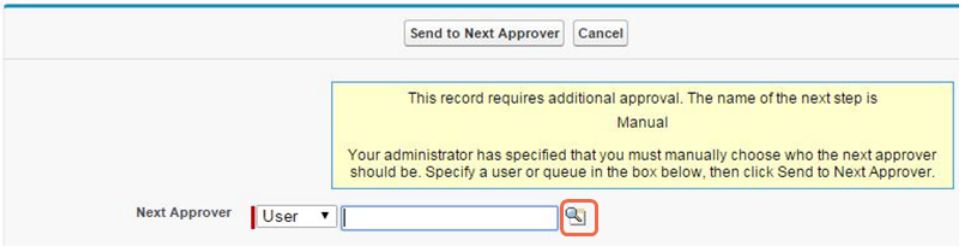
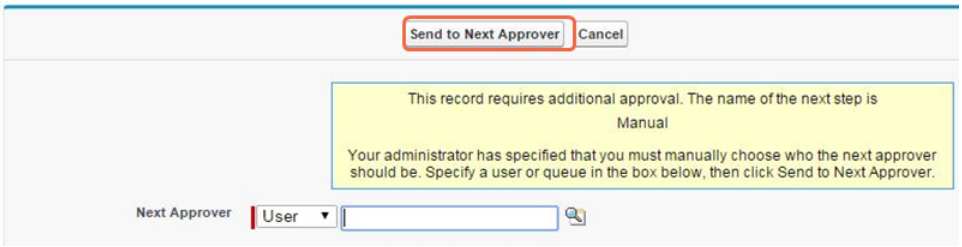
Step By Step

1 The salesrep 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**	

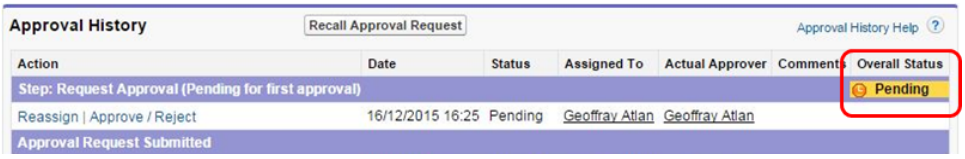
The sales rep will have to select his manager to approve or a user that has visibility on the quote.



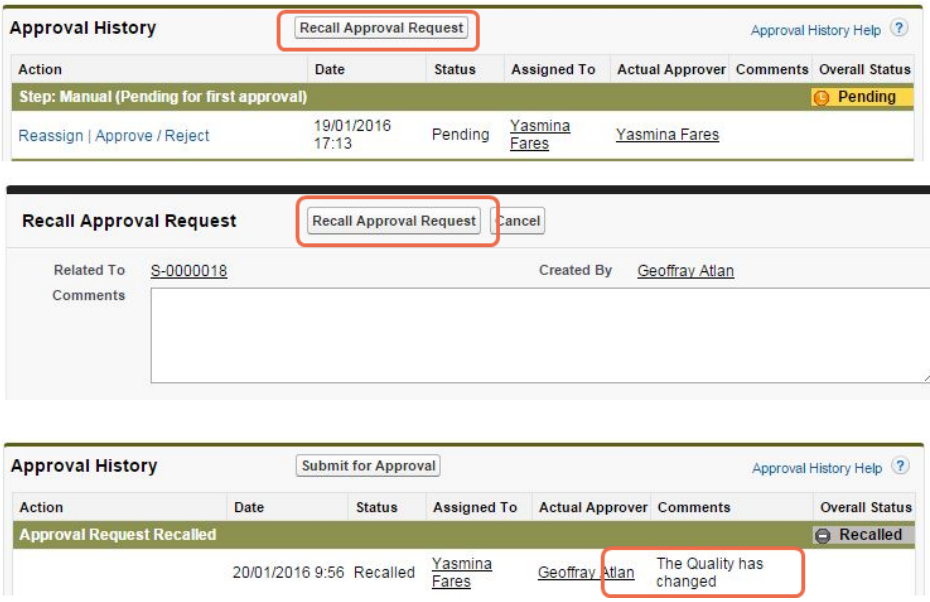
2 Once selected, the salesrep will click send to next approver



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

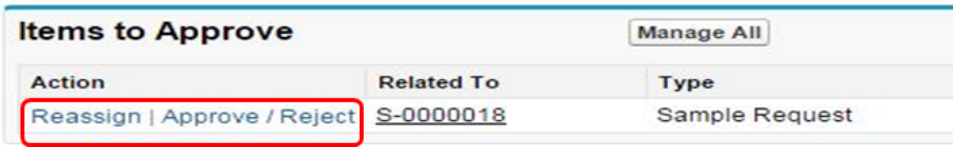


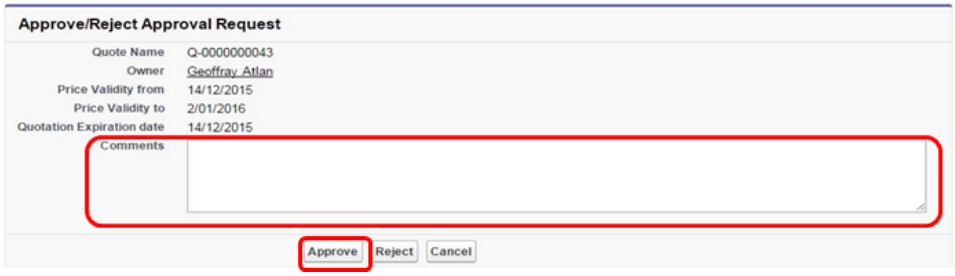
4 When the quote is submitted for approval, no modification is allowed. So if the salesrep needs to modify data he can recall the approval request and update information before submitting it again.



5 The actions available for the approver are:

•Reassign the request
•Approve the request
•Reject the request



6 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.	

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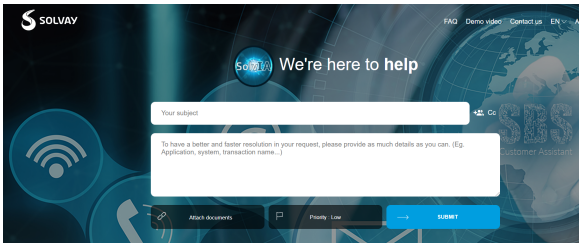
- Quote Creation
- Quote Creation from a Growth Business Opportunity.
- Quote Mass Clone
- Quote Mass Update
- Quote Manual Sharing
- Quote communication
- Quote Email Template creation
- Customer validation and Follow up
- Create a New Opportunity
- Clone an Existing Opportunity
- Definitions, Types 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