

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
Opportunity	Opp Les Aristochats Quote 2
Visibility	
GBU	Novecare
BU	
Expiration date	
Owner	Missive Sings (Change)
Status	Denied
Currency	
CSR	
Back Up	

Status dropdown menu options: Denied, Draft, Sent, Accepted, Denied



If the Quote is rejected, the sales representative then denied value in the test as insufficient and the process ends. If the Quote

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ication of the sales representative when a no order is created for a specific Qot can be done by the CSR through not sor

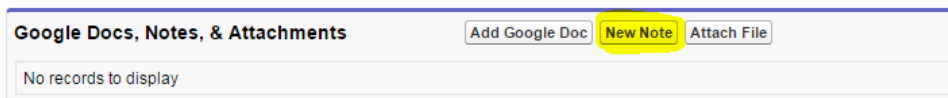
chatter if needed.

Follow up tools

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

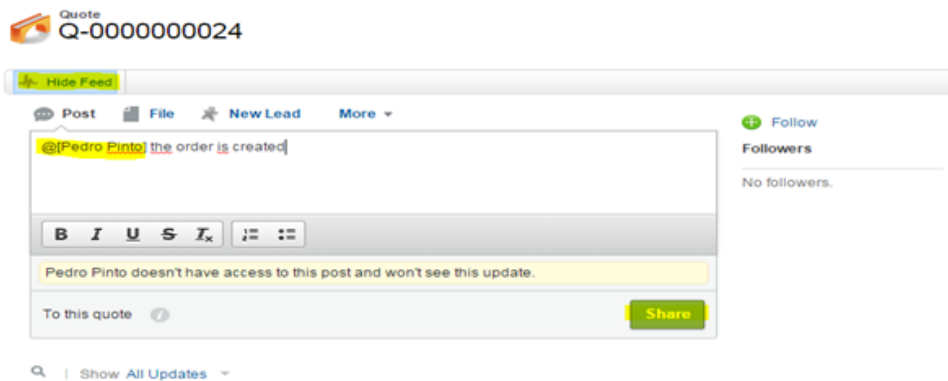
He can use notes or chatter.

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.



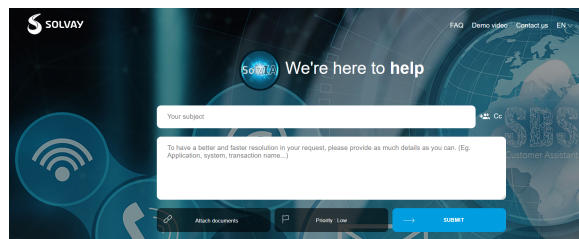
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Related articles

- [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](#)

Need help?

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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