

Quote Approval Process

Overview

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

Concerned profiles:

ALL

Step By Step

Table of content

- [Step By Step](#)
- [Related articles](#)
- [Need help?](#)

1 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**

Quote Edit

Save

Save & New

Cancel

Information

Quote Name

Q-0000000361

Opportunity

alca

Quote Title

alca

Visibility

GBU Restricted

GBU

Soda Ash & Derivatives

BU

Soda Ash

Expiration date

30/11/2016

(22/08/2016)

Legal Quote Header

Owner

Françoise Coussy

Status

Draft

Comments for the Approval

Currency

EUR - Euro

Customer Service Representative

Anne Gilles

Required Information

Approval History

Submit for Approval

No records to display



The sales representative will have to select this manager to approve or raise user that has visibility on the quote.

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

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

Action	Date	Status	Assigned To	Actual Approver	Comments	Overall Status
Step: Request Approval (Pending for first approval)						
Reassign Approve / Reject	16/12/2015 16:25	Pending	Geoffray Atlan	Geoffray Atlan		Pending
Approval Request Submitted						

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.

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

Action	Date	Status	Assigned To	Actual Approver	Comments	Overall Status
Step: Manual (Pending for first approval)						
Reassign Approve / Reject	19/01/2016 17:13	Pending	Yasmina Fares	Yasmina Fares		Pending

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

Related To S-0000018 Created By Geoffray Atlan

Comments

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

Action	Date	Status	Assigned To	Actual Approver	Comments	Overall Status
Approval Request Recalled						
	20/01/2016 9:56	Recalled	Yasmina Fares	Geoffray Atlan	The Quality has changed	Recalled

5 The actions available for the approver are:

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

[Items to Approve](#) [Manage All](#)

Action	Related To	Type
Reassign Approve / Reject	<u>S-0000018</u>	Sample 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.

Approve/Reject Approval Request

Quote Name	Q-0000000043
Owner	<u>Geoffrey Atlan</u>
Price Validity from	14/12/2015
Price Validity to	2/01/2016
Quotation Expiration date	14/12/2015

Comments

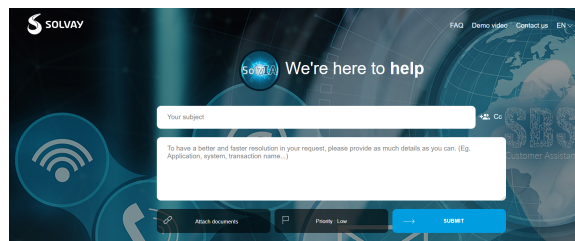
[Back to the top](#)

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