

Sample: Approval Process

Overview

In this section, you will find information about:

- Approver assignment
- What can do the approver

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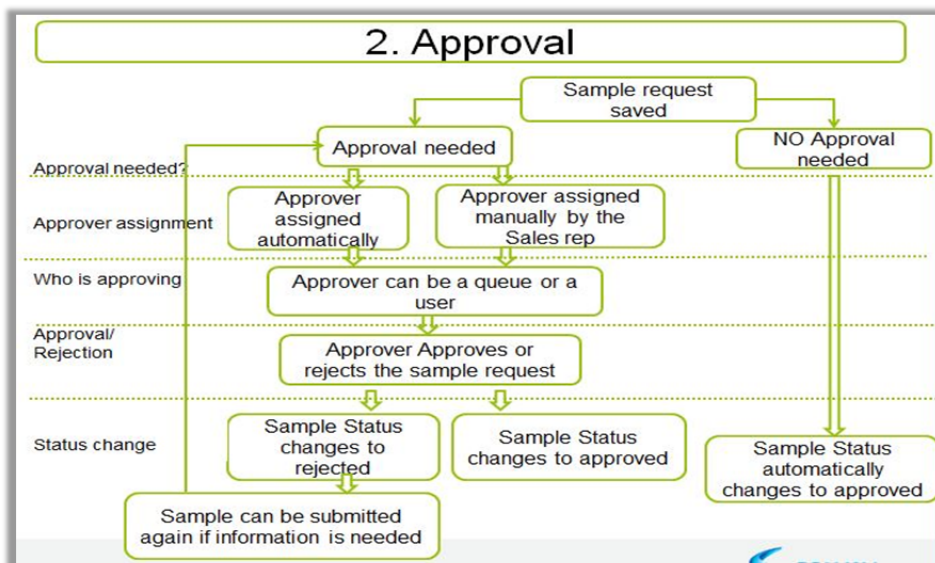
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Step By Step

Assignment

Once the Sample request has been created, the Sales rep must submit it for approval.

Each GBU has their own rules to assign the samples request to the correct approver



Approver assignment can be done only by clicking the submit for approval button

Approval History

No records to display

There are **3 ways to assign the approver to the request** :

- Automatically assigned by the system following specific criterias
- Manually assigned by the user
- No assignment – Request automatically approved after clicking submit for approval.



All assignment criterias per GBU and specific cases are in appendix

Once assigned, the approver can do 4 actions:

- **Reassign the request** – Click on reassign link
- **Approve the request** – Click on Approve/Reject link
- **Reject the request** – Click on Approve/Reject link
- **Ask for more information** – By clicking need more information checkbox and rejecting the request

EXPLANATION of the steps:

• Reassign the request to another approver by clicking on the “Reassign” button.

Items to Approve		Manage All
Action	Related To	Type
Reassign	Approve / Reject S-0000018	Sample Request

The following page will be displayed

Reassign Approval Request Q-0000000007 Help for this Page

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


Related To: [Q-0000000007](#) Created By: [Geoffray Atlan](#)
Approver: [User](#) [Geoffray Atlan](#) Assigned Approver: [Geoffray Atlan](#)
Comments:

The approver needs to select a new approver and clicks on the « Reassign Approval Request » button.

• Approve the Request by clicking on the Approve button.

Items to Approve		Manage All
Action	Related To	Type
Reassign	Approve / Reject S-0000018	Sample Request

The following page will be displayed

 Once approved, no modification will be allowed after approval. Only the “Additional shipping information” field will be editable by the submitter. If quality is changing, the sample request will have to be cloned and submitted again. If the information has to be changed like the ship to account, only the comment field will be modified.

•Reject the request

The rejection will be used in 2 cases:

•When the approver wants to reject the request

•When the approver will need more information to approve a sample request he /she will have to check the “need more information” checkbox (on the Sample page)

▼ System Information

Case Origin

Need Information for Approving

Edit Delete Close Case Clone Sharing Submit for Approval

Approver actions

After having tick the field “Need for more information”, the Approver will click on the “Approve / Reject” button on the related list

The following page will be displayed.

Approve/Reject Approval Request

Quote Name	Q-000000043
Owner	Geoffroy Atlan
Price Validity from	14/12/2015
Price Validity to	2/01/2016
Quotation Expiration date	14/12/2015

Comments

Approve Reject Cancel

The approver will add comments on the approval page in order to specify why he rejects the Sample Request. Then, he will click on the « Reject » button.

The status value of the Sample Request will then be « **Rejected** »

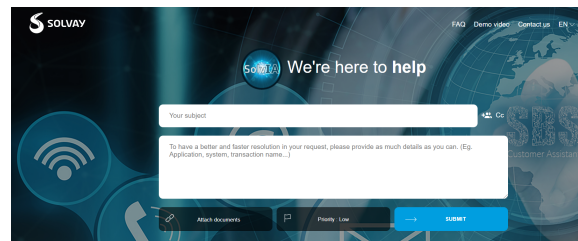
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Related articles

- [Sample: Create a Sample](#)
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- [Sample: Follow up actions and Closure](#)

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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