

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

Step By Step

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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-0000000024

Customize Page | Edit Layout | Printable View

Show Feed

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Quote Line Items (6) | 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-0000000024	Owner	System Admin (Change)
Opportunity	Opp Les Aristochats Quote 2	Status	Denied
Visibility		Currency	Draft
GBU	Novecare	CSR	Sent
BU		Back Up	Accepted
Expiration date			Cancelled



If the Quote is rejected, the sales representative has the determined value in the statement of field and the process ends. If the Quote

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the CSRR field.

The CSRR will therefore create the Order in SAP after receiving the Purchase order document.

Then
notif

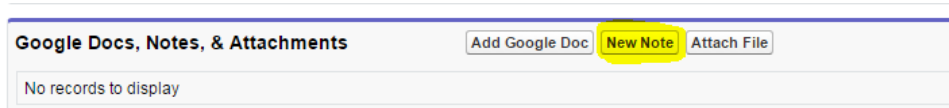
ication of the sales representative when an order is created for a specific Quote can be done by the CSR through notes or

Follow up tools

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

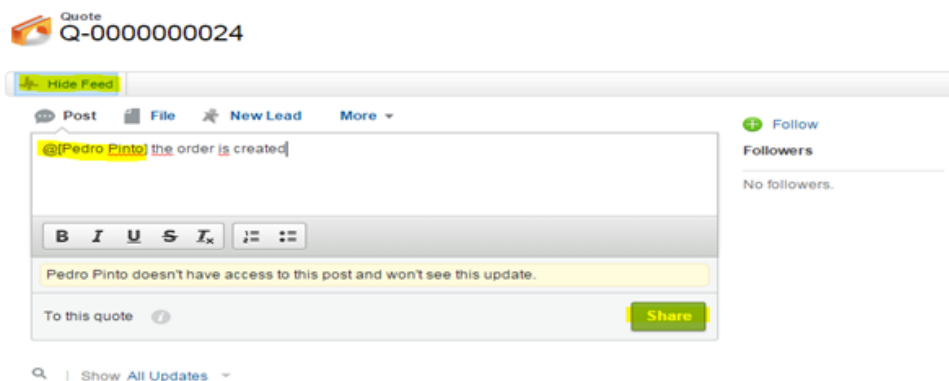
He can use notes or chatter.

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.



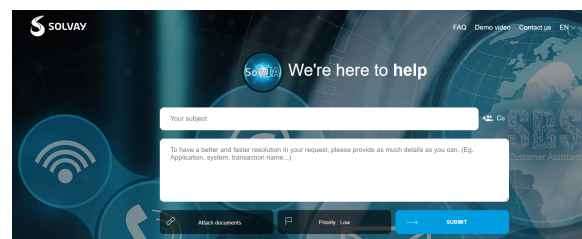
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Related articles

- [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](#)

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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*