

# Define the Quote Team

## Overview

In this section, you will find information about the process to add members in the Quote team

### Concerned profiles:

ALL quote owners

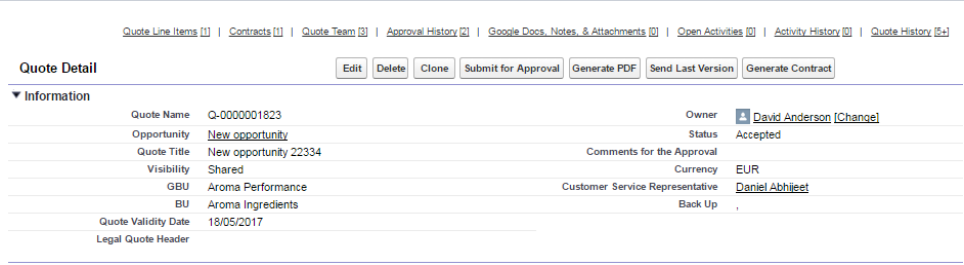
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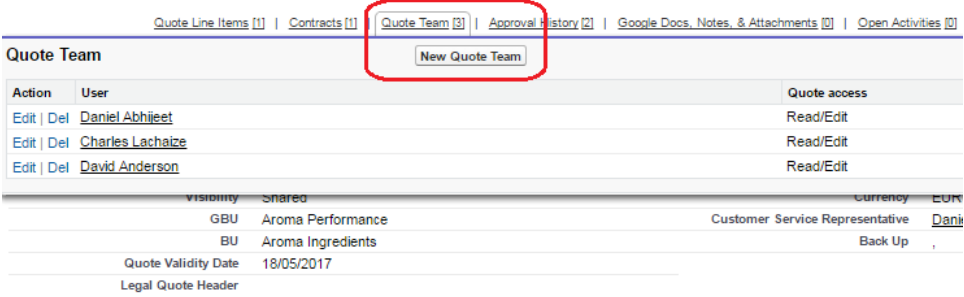
## Step By Step

### Fill in the Quote Team

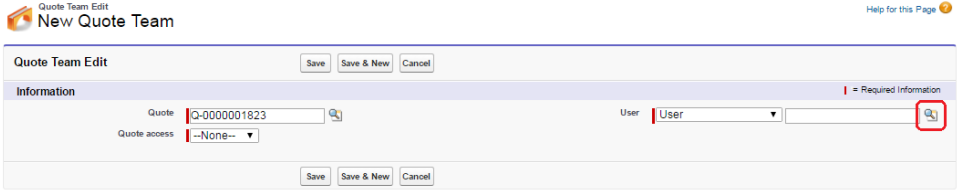
**1** David opens his new quote form or which he wants to add Pedro in the team



**2** He hovers the Quote Team and discovers he's already in the team! He now clicks on New Quote Team in order to add Pedro in the team



**3** David must now click on the look-up to open the search windows



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Once the window opens, he searches for **Pedro** and clicks on Pedro's name

The screenshot shows a 'Lookup' window with a search bar containing 'pedro' and a 'Go!' button. Below the search bar, there are radio buttons for 'Name' (selected) and 'All Fields'. A link '< Clear Search Results' is visible. The 'Search Results' section shows a table with one entry: 'Pedro Pinto', which is highlighted with a red box. The table has columns for 'Full Name', 'Title', 'Phone', and 'Email'. At the bottom, there is a copyright notice: 'Copyright © 2000-2015 salesforce.com, inc. All rights reserved.'

Full Name	Title	Phone	Email
Pedro Pinto	Commercial Excellence Process Manager	3222643405	pedro.pinto=solvay.com@example.com

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Before saving, David defines Pedro's quote access. When he's finished, he clicks on **Save**.

The screenshot shows the 'Quote Team Edit' form. At the top, there are buttons for 'Save', 'Save & New', and 'Cancel'. The 'Information' section contains a 'Quote' field with the value 'Q-0000001823' and a 'User' dropdown menu set to 'User' with 'Pedro Pinto' selected. A 'Quote access' dropdown menu is set to 'Read/Edit'. At the bottom, there are buttons for 'Save', 'Save & New', and 'Cancel'. A red box highlights the 'Save' button.



R e a d / W r i t e  
: give the permission to the team members to edit the quote

R e a d O n l y  
: give visibility permission only

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It's done! David has added Pedro in the team.

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Pedro can now make the quote evolve and update some data

Action	User	Quote access
Edit   Del	Daniel Abhijeet	Read/Edit
Edit   Del	Charles Lachalze	Read/Edit
Edit   Del	David Anderson	Read/Edit
Edit   Del	Pedro Pinto	Read/Edit

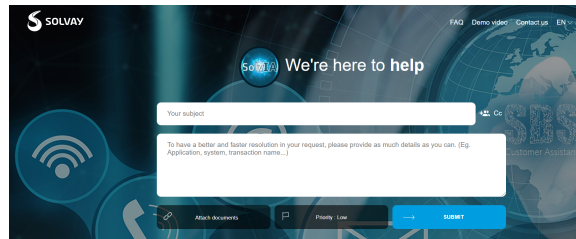
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## Need help?

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*