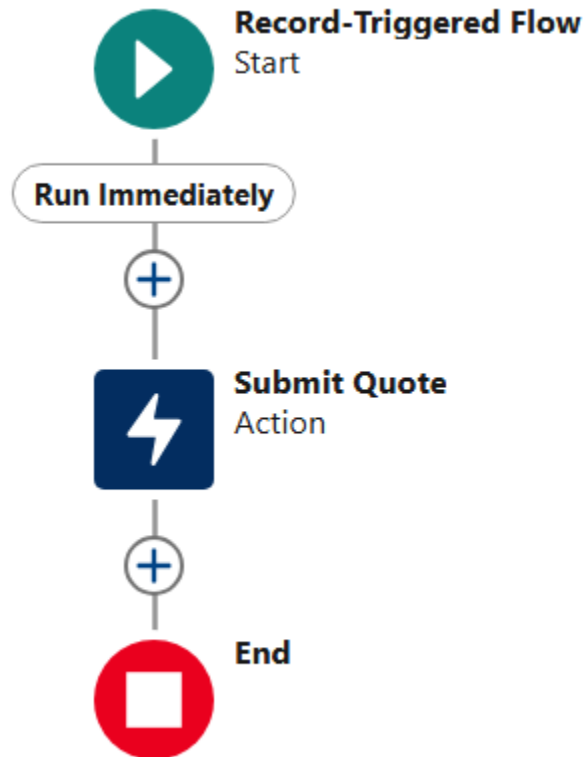


Testing Results

For Quote Approval:



Successful scenario

1. After creating the Contact, Opportunity and Quote.
2. Set Quote Status to "In Review".
 - a. Review Status checkbox will stay as true until **approved/rejected**.
3. Automatically will send a notification for the User assigned for approval.

Case 1:

1. After creating the Contact, Opportunity and Quote.
2. Set Quote Status to "In Review".
 - a. Review Status checkbox will stay as true until approved/rejected.
3. Automatically will send a notification for the User assigned for approval.

4. User assigner **approves** the Quote.
5. Quote Status is set to “Approved”.

Case 2:

1. After creating the Contact, Opportunity and Quote.
2. Set Quote Status to “In Review”.
 - a. Review Status checkbox will stay as true until approved/rejected.
3. Automatically will send a notification for the User assigned for approval.
4. User assigner **rejects** the Quote.
5. Quote Status is set to “Approved”

For Send PDF to Email:



Successful scenario:

1. After the approval process previously made, if succeed set Status to “Approved”

2. Generate a PDF Quote from Quote Page Layout
3. If Quote Status is set to “Accepted” it would send the last PDF Quote made to the Contact email attached to Quote.
4. PDF Quote is sent.

Case 1:

1. After creating the Contact, Opportunity and Quote.
2. Hove over Quote and create a PDF Quote.
3. Skip Quote all Status to “Accepted”, there is no restriction.
4. Without approval process, a PDF Quote can still be sent.

Case 2:

1. After creating the Contact, Opportunity and Quote.
2. Create multiple PDF Quotes for a Opportunity.
3. Set Quote Status to “Accepted”.
4. Only last made PDF Quote is sent to the Contact email.

Limitations and Observations:

- If User for approval wants to be changed is necessary to modify the automation process from approval process.
- Sending a PDF_Quote Email should be available only after the approval process has been approved by the User.
 - Shouldn't have an option to do so if the approval has been rejected or ignored.
- Only the last PDF Quote made is sent, should be an option to choose between all the Quotes made for a Student.
- Approval Flow can be totally ignored to proceed with the stages of the Quote.
- Could have been an Approval Process for Opportunity instead of Quote.
- If a PDF Quote is not created already, the Flow doesn't work correctly and have to deselect and select Status “Accepted” again.