# **ARC 6555 – Quote Approval with Discount Percentage Tier**

1. Introduction

Test Tooling Solutions (TTS) has a process of quote approval based on the discount percentage tier on the quote lines. Quote that has discount percentage on the quote line will need approval from Sales Manager, Sales Director, Program Manager, or COO/CEO. Quote that doesn’t have discount at all will be automatically approved by the system. For example: Sales Manager can approve Quotes with discount percentage between 0% to 3%, Sales Director can approve Quotes with discount percentage between 3.01% to 5%, and so on. Sales Manager can only see quotes that are within his/her discount percentage range. This applies to all the approvers whether it is Sales Director, Program Manager, or COO/CEO.

1. Installation

This project can be installed from ARC. The project number is 6555.

There are several new menu items:

* Estimating / Routing & Quote Management > View > Quote Approval Status (6555)

Use: GAB\_6555\_QUOTE\_APPROVAL\_STATUS.g2u

* Estimating / Routing & Quote Management > View > Quote Approval Status - Administrator (6555)

Use: GAB\_6555\_QUOTE\_APPROVAL\_STATUS\_ADMIN.g2u

* Estimating / Routing & Quote Management > Transactions > Quote Approval List (6555)

Use: GAB\_6555\_QUOTE\_APPROVAL.g2u

* Estimating / Routing & Quote Management > Administration > Quote Approver Setup (6555)

Use: GAB\_6555\_SETUP.g2u

There are also several Hooks activated:

* Hook: 10710 – GAB\_6555\_QUOTE\_APPROVAL\_REQ.g2u
* Hook: 10260 – GAB\_6555\_QUOTE\_APPROVAL\_REQ.g2u
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* Hook: 10721 – GAB\_6555\_QUOTE\_APPROVAL\_REQ.g2u
* Hook: 10775 – GAB\_6555\_QUOTE\_APPROVAL\_REQ.g2u
* Hook: 10850 – GAB\_6555\_QUOTE\_APPROVAL\_REQ.g2u
* Hook: 10940 – GAB\_6555\_QUOTE\_APPROVAL\_REQ.g2u
* Hook: 10920 – GAB\_6555\_QUOTE\_APPROVAL\_REQ.g2u
* Hook: 17330 – GAB\_6555\_QUOTE\_APPROVAL\_REQ.g2u
* Hook: 28301 – GAB\_6555\_QUOTE\_APPROVAL\_REQ.g2u

1. Configuration

Once the installation is completed, please do the following steps:

* Estimating / Routing & Quote Management > Administration > Quote Approver Setup (6555)

1. Click on Tab ‘Disc Pct Tier’. Create the Discount Percentage Tier

Table

Description automatically generated

1. Click on Tab ‘Approver’. Assign the username to the discount percentage tier.

Table

Description automatically generated with medium confidence

1. Click on Tab ‘Approver – Customer’. Assign the approver to the customer/prospect. Only those customers/prospects assigned to the approver can be managed by the approver.

Graphical user interface

Description automatically generated

1. Usage Procedures

* Create Quote through Estimating / Routing & Quote Management > File > Quick Quote > New

1. Quote with no discount percentage on the lines is automatically approved. The Quote Header will show the Approver is ‘SYSTEM’ and the approved date.



1. Quote with discount percentage on the lines will be flagged for approval. The quotes have to be approved first before they can be printed and sent to customer/prospect.
2. Approvers will get email notification that there is a quote needing his/her approval.

* Approver runs Estimating / Routing & Quote Management > Transactions > Quote Approval List (6555), to see the list of quotes to be approved

Approver reviews the quote, then approves or rejects the quote. Originator of the quote will get email notification whether the quote is approved or rejected.

* Approver runs Estimating / Routing & Quote Management > View > Quote Approval Status (6555), to see the list of quotes with its corresponding statuses (Approved, Pending, Rejected). This screen restricts the quotes to be seen by the approver based on the Upper Discount Percentage Tier and approver to customer link.

All quotes with Disc Pct lower than the approver’s upper discount percentage and the customer is in the approver to customer link will appear for the approver.

* Estimating / Routing & Quote Management > View > Quote Approval Status – Administrator (6555) allows user to see all the quotes in the system without any restriction to the discount percentage tier or approver to customers link.