

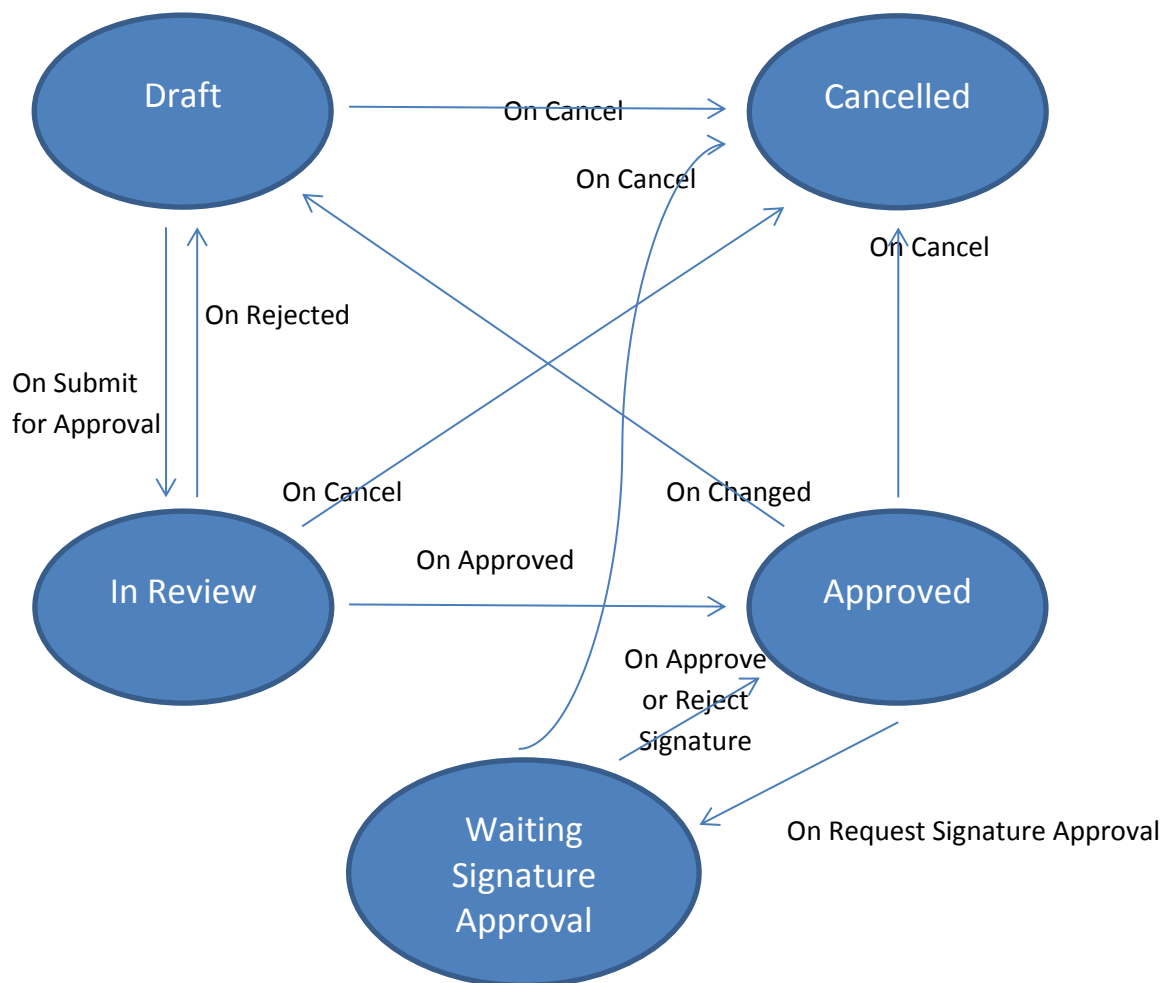
Mudd Quotation Workflow

Sales Orders need to be completely *eliminated*. We will only be working with Quotations. Quotes can be edited at any stage **except** at the “In Review” and “Waiting Signature Approval” stages. In this stage the Quotation must be “Rejected” first, which would put it back in the “Draft” stage, where edits can be made.

Quote Stages

The stages that a Quote will go through are:

Draft, In Review, Approved, Waiting Signature Approval, or Cancelled



“Draft” Stage Buttons:

| Print | Submit for Approval | Cancel Quotation |

“In Review” stage Buttons (Salesman):

| Print | Cancel Quotation |

“In Review” stage Buttons (Manager):

| Print | Approve | Reject | Cancel Quotation |

“Approved” Stage Buttons:

| Send by Email | Print | Request Signature Approval | Cancel Quotation |

“Waiting Signature Approval” stage Buttons (Salesman):

| Print | Cancel Quotation |

“Waiting Signature Approval” stage Buttons (Manager):

| Print | Approve Signature | Reject Signature | Cancel Quotation |

The Salesman will fill out the Quote, save it, and then “Submit for Approval”. The appropriate people who belong to a defined Manager role will have to authority to “Approve” or “Reject” the Quotation. Also at this stage (which includes both “Draft” and “In Review” stages) the salesman can print out the Quote, but it needs to be watermarked with the words “UNAPPROVED” on it.

If the Manager “Reject”(s) the Quote, it will revert back to the “Draft” stage. If the Manager “Approve”(s) the Quote, the Salesman will email the Quote to the customer, or will print and fax the Quote to the customer. If the customer rejects the Quote, the salesman will edit it (which puts it in the “Draft” stage) and “Submit for Approval” again. If the customer signs it, the salesman will attach the signed copy to the Quote (using the Document Management facilities) and “Request Signature Approval”.

The Manager will “Approve Signature” or “Reject Signature”. If rejected, the Quote will revert back to the “Approved” stage. If approved, the Quote will also revert back to the “Approved” stage and a x_signed flag (Quote custom field) will be set to **true** on the Quotation. Approval of the signature will also be the trigger to automatically create an Invoice based on the Quotation. Once the invoice is created, certain groups need to be notified. A group in accounting needs to be notified that the Invoice

was created, and a project manager group (the person or persons that will create the Projects based on the Quote's line items) will need to be notified that a Project(s) need to be created based on the Quote.

At this point the Salesman (and/or other authorized groups) can still change the Quotation, which would put it back in the "Draft" stage again, then follow the previous approval process. The big difference is that the "Signed" flag attached to the Quote would not change (it will never change once it has been set). The "Waiting Signature Approval" stage will no longer be applicable or visible and another invoice would not be created, but any time a change is made to the Quote and "Approved", the same Accounting and Project Management groups would be notified of the changes so that they can manually make the appropriate changes to the Invoice and/or Project.

Printing the Quotes

There are certain items on the Printed Quotes that will change based on some criteria of the first line item that appears on the Quote. These are the appearance, or not, of an additional logo at a certain spot on the printed Quote, and a slight change in the Terms and Conditions verbiage based on the type of product that appears on the first line item of the Quote.

I would like to just concentrate on getting the Contract Sample that I sent you called "Blank Contract - Direct Mail.pdf" done first, then we can go into how to apply the above requirements.