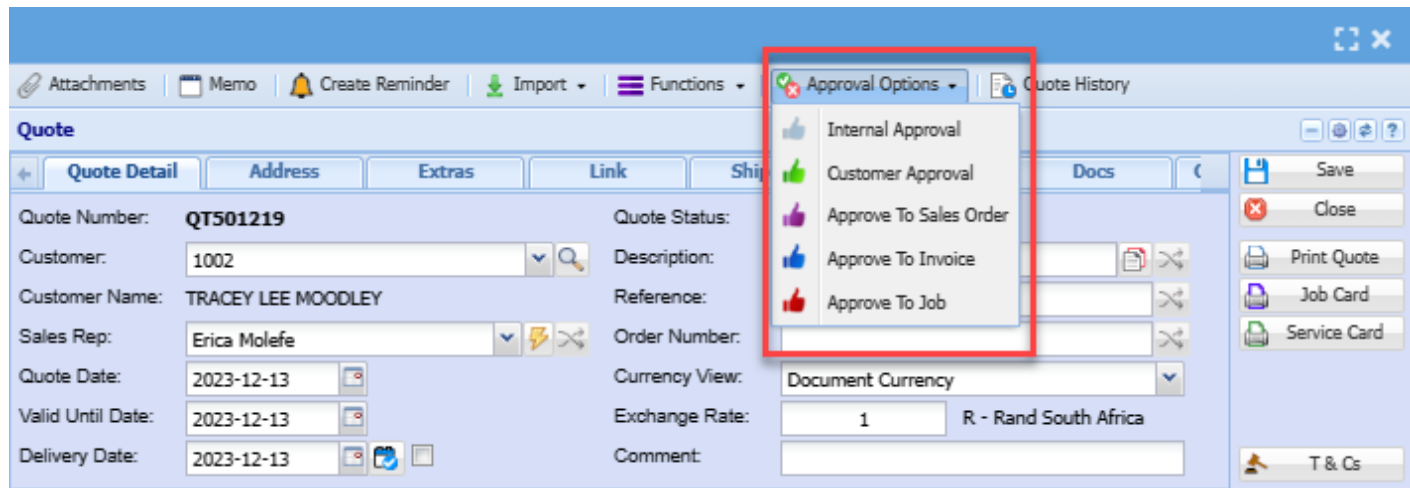


Approval Options Drop Down

Debtors> Activity> Quotation> Approval Options



The screenshot shows a software interface for managing quotations. A dropdown menu titled 'Approval Options' is open, displaying five options: 'Internal Approval', 'Customer Approval', 'Approve To Sales Order', 'Approve To Invoice', and 'Approve To Job'. Each option is preceded by a thumbs-up icon. The background shows a 'Quote' form with fields for Quote Number (QT501219), Customer (1002), Customer Name (TRACEY LEE MOODLEY), Sales Rep (Erica Molefe), Quote Date (2023-12-13), Valid Until Date (2023-12-13), Delivery Date (2023-12-13), and various other details like Description, Reference, Order Number, Currency View, Exchange Rate, and Comment.

Internal Approval	This is when all involved parties that work for the company are happy with the quote then it can be approved internally.
Customer Approval	After the quote has been approved internally it can be sent for customer approval.
Approve to Sales Order	If you want to approve the quote to a Sales Order.
Approve to Invoice	If you want to approve the quote to an Invoice
Approve to Job	If you want to approve the quote to a Job
Return to Internal Approval	This button allow you to return the quote for internal approval
Return to Preparation	Return the quote to preparation status

Revision #4

Created 19 July 2023 22:00:03 by Paige

Updated 2 July 2024 05:16:01 by Otsile