Proposal Approval Process

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Users can submit proposals for approval when the proposals follow approval rules. This is the general proposal approval process:

Setup

- Turn on proposal approval: System Defaults > Require Proposal Approval = YES (Do not set this to NO if any proposals are pending approval; the edit button on the proposals will be disabled, and no one will be able to edit the proposal.)
- Set up departments: CRM > Departments (Departments must have one or more approvers for a proposal to go through approval process. Only administrators can set up departments.)
- Add proposal rules: Setup > Proposal > Approval Rules (Only administrators can set up approval rules.)

Proposal Creation and Approval

- A user creates a proposal that matches the condition(s) in an approval rule (proposal type/department/amount) and saves proposal.
- The proposal creator clicks the Submit for Approval button. There is a prompt: Are you sure you want to submit this proposal? You will no longer be able to edit this proposal until it is either approved or declined. Click Yes.
- Proposal status is restricted while pending approval; the proposal creator cannot change status to sold or closed.
    - The first approver gets an email about proposal approval.
        - The first approver logs into Managely.
        - The first approver can see proposals pending approval in CRM > Proposals > Approval Queue tab (this tab shows only proposals that the first approver can approve. Admin users can see all proposals pending approval. Admin users can approve proposals on behalf of an approver.)
            - There are three ways for an approver to get to a proposal to review: link in the email; Approval Queue tab review button; open the proposal from the list.
        - On the Proposal page, the first approver sees these buttons: Accept or Decline.
        - If the first approver declines the proposal: (the second approver, if there is one, does not get an email about proposal approval)
            - The approver enters a reason for declining.
            - An email goes to the proposal creator about the declined proposal.
            - The proposal creator logs into Managely.
            - On the Proposal page, the proposal creator sees the reason the proposal was declined (top left, proposal shows Needs Revision).
            - The proposal creator edits the proposal and submits the proposal for approval again.
            - The first approver gets an email about proposal approval.
            - The approver logs into Managely.
            - On the Proposal page, the approver sees these buttons: Accept or Decline.
        - If the first approver accepts proposal:
            - There is a message showing the proposal has been accepted and the proposal closes.
    - The second approver (if there is one) gets an email about proposal approval.
        - The second approver logs into Managely.
        - The second approver can see proposals pending approval in CRM > Proposals > Approval Queue tab (this tab shows only proposals that the second approver can approve.)

    - On proposal page, the second approver sees these buttons: Accept or Decline.
    - If the second approver accepts the proposal, the proposal creator gets an email stating proposal has been approved. (The proposal shows the Finalize and Complete Proposal button.)
- The proposal creator goes to the proposal detail screen and can click **Finalize and Complete Proposal** button or edit the proposal and send it through the approval process again.