

Quote Process Flow

Quotes will generally follow the process below:

1. **Creation** - A quote is generated by the facility and emailed to the recipient.
2. **Approval** - After creation the quote is email to the recipients for approval
 - Recipients will receive an email with a PDF of the quote and a link to submit their approval. Approval is performed by entering their full name, any comments, and then clicking the approve or reject buttons.
3. **Review + Acceptance** - Approved or Rejected quotes are then reviewed by the facility for acceptance. The facility contact email(s) will receive a notification email when a quote is approved or rejected.
4. **Archiving** - Post-Acceptance the facility may mark a quote as archived to remove it from the active quotes list. Usually this occurs after work has either begun or is completed on a given quote/project.

Revision #1

Created 26 February 2024 16:16:32 by Elliot Francis

Updated 26 February 2024 16:21:31 by Elliot Francis