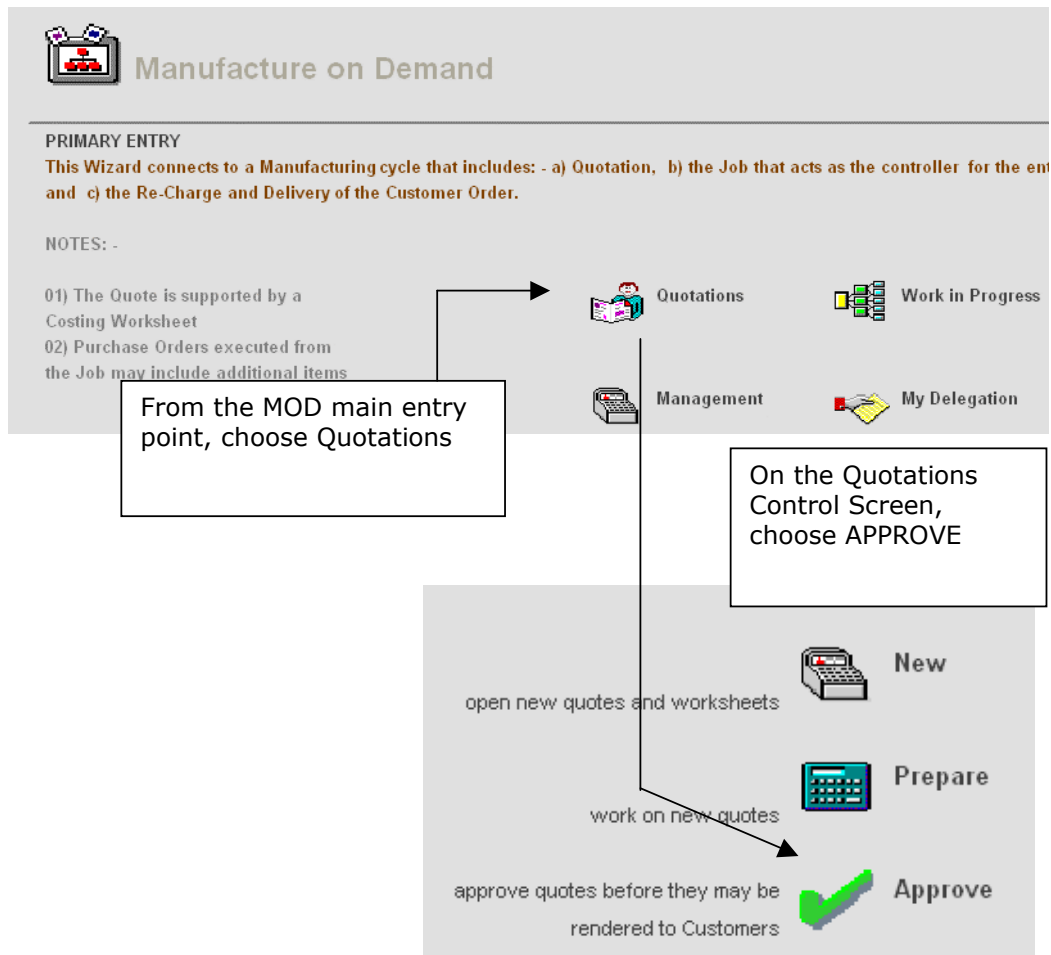



MOD: APPROVAL FOR RELEASE OF THE QUOTATION

Entering the Sheet to Approve

When the Originator of the Sheet requests Approval for Release of the Quotation to the Customer, then the system automatically sends a WIP message to the Authorizer to this effect. That means that when the Authorizer opens Manufacture, the grid at the bottom already shows clearly that there is an Approval Request begging his / her attention. So the Authorizer can enter the Sheet directly by dbl-clicking the Message, or, alternatively, enter in the conventional way by opening the Quotations Control Screen, and then choosing the APPROVE step.



The purposes of the Approval for Release of the Quotation are multiple. In the 1st instance, an Authorizer approves that the Items and Prices quoted to the

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MOD: APPROVAL FOR RELEASE OF THE QUOTATION

Customer are in order. Further to that, the Authorizer may review any of the steps that the Originator performed in preparation of the Quotation and Costing Sheet, and may make changes as he / she may deem fit. Once the Authorizer approves the Quotation, he / she is also approving at the same time the Costing Budgets (Input Cost Elements and PO Requisitions) on the Sheet, and appoints a Controller who will be responsible for further execution of the Task. The Controller may then operate within the limits of the Costing Budgets imposed on the Sheet, once the Customer accepts the Quotation and the work commences. Although the PO Requisitions on the Sheet are provisionally approved, the Authorizer still remains responsible for Approval of each and every Purchase Order Requisition on the Sheet before each becomes an Order and the Order may be placed with the Supplier.


This does not mean that further supplements to the MOD Sheet or Purchase Requisitions are forbidden, but it does mean that any such supplements will have to pass by the Authorizer again for approval before they can be processed.

1	Review the Rules, Deposit, Quote To detail, and Budgets ...	<input type="button" value="Review Approval Data"/>
2	Optional - Pre-View the Quotation to ensure it is correct as planned ...	<input type="button" value="Pre-View Quotation"/>
3	If satisfied, please Approve	<input type="button" value="Approve"/>
OR		
4	If the Quotation is unsatisfactory or needs further work, or corrections, you can return it to the Originator with further instructions ...	<input type="button" value="Return to Originator"/>
Use this option ONLY if you have to Cancel the Quotation ...		<input type="button" value="Cancel Quotation"/>

As mentioned above, the Authorizer may perform any of the steps that the Originator performed while preparing the Quote and Sheet. These actions are explained in the User Manual for the Preparation step, and will not be repeated here.

What we need to note here, is that the Approval Page at this step has 2 Functions not found during the Preparation step:

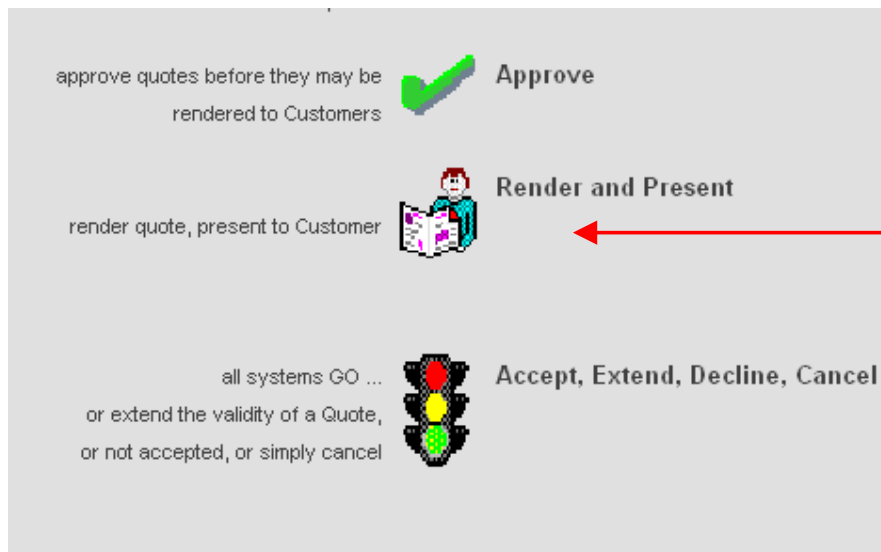
- 1) Return to Originator – This is used by the Authorizer if the Quote is wholly unacceptable, or needs a major re-work. If only small changes are

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MOD: APPROVAL FOR RELEASE OF THE QUOTATION

- required, or Amounts or Quantities need some adaptation, the Authorizer may perform those directly before using APPROVE.
- 2) Approve – When the Authorizer approves the Quotation and Sheet, the system releases the Quotation for presentation to the Customer, locks the Cost Budgets (which can then no longer be changed by the Originator or Controller, but only by the Authorizer), and prompts for Assignment of a Controller, who will be responsible for further execution of the Sheet after the Customer accepts the Quotation, and sends a WIP message to the assigned Controller to note the event. If the person who will be responsible for rendering the Quote is not the final Controller, then the Controller can be re-assigned again once the Customer accepts the Quotation.

Once the Quotation has been approved for release, the Originator or Controller enters the Sheet again, this time with the RENDER step, and produces the Quotation for presentation to the Customer.



1 Headers	2 WIP Notes
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MOD: Manufacture Control Sheet
: QUOTATION R

<p>Control Parameters</p> <p>Sheet # 000039</p> <p>Status Approved</p> <p>Age (Days) 10</p>	<p>Once the Quotation is rendered, it moves to the next phase, during which it may be rendered again, and further actions become available.</p> <div style="text-align: right;"> <input type="button" value="Render Quotation"/> </div>
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The RENDER step, as seen above, offers no other functions than viewing the WIP messages, and to RENDER the Quotation. The step is nevertheless mandatory, and nobody will be allowed to do any further work on the Sheet until this step has been duly performed.

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MOD: APPROVAL FOR RELEASE OF THE QUOTATION

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