

ITEM ACTIONS

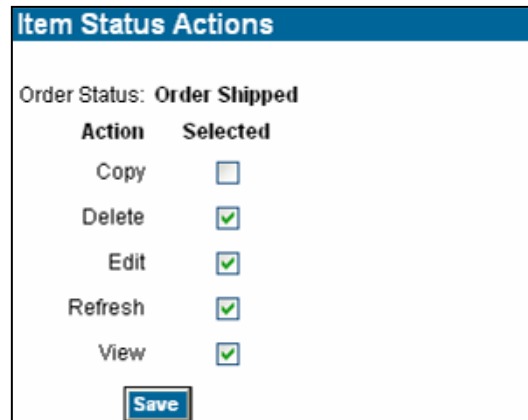
In addition to administering the status and actions for quotes/orders, whether or not a certain actions are available for individual items in a quote/order can also be controlled. This is accomplished by selecting the **Item Actions** link under the **Workflow/Approvals** drop down.

The left column in the Item Actions screen is the quote status. The right column shows the actions that can be performed on items. Figure 10-1 is an example showing that the individual items in a quote can be **viewed**, **edited**, **deleted**, and **refreshed** while a quote is in the Open status.



Figure 10-1 Item Actions

Clicking the **[?]** link, or existing action(s), brings up the **Selection Screen** for that Item Action. The actions which can be selected, or deleted if already selected, are **Copy**, **Delete**, **Edit**, **Refresh**, and **View**, as displayed in Figure 10-2.



Action	Selected
Copy	<input type="checkbox"/>
Delete	<input checked="" type="checkbox"/>
Edit	<input checked="" type="checkbox"/>
Refresh	<input checked="" type="checkbox"/>
View	<input checked="" type="checkbox"/>

Save

Figure 10-2 – Item Status Actions Selection

Item Actions can be set for each of the three status areas: **My Quotes**, **Waiting for Approval**, and **Other Quotes**.

If an Approver needs to be allowed to edit a Quote (change, add, or delete quote items) before they approve it, this is where this is defined. Selecting **Waiting for Approval** or **Other Quotes** from the dropdown defines authorizations for those areas.



My Quotes ▼
My Quotes
Waiting for approval
Other Quotes

Note: When an Approver edits a quote, different discounting options and order placing options are applied than the creator's discounts (see Chapter 25).