
SETTING UP THE APPROVAL PROCESS

The Approval Process allows high level of Quotation and Ordering control directly through the settings at the Administration level. The tree structure can be set up based on the business requirements and use the advantages of automated cart approval control.

Site users can be organized into groups distinguished by several types of characteristics.

- limit Cart amount for every user
- authorize parent user to approve child's Quotation exceeding specified child's authorized amount (Quotation queries and email notifications are created automatically)
- authorize parent to edit or not the child's Quotation before approval
- define Amount Limits for Users and User Groups differently, and chose which limit has priority
- specify to which hierarchical level are Quotations transferred for approval
- authorize or not the middle levels to see transferred Quotations

Webcom's CPQ supports management of several more types of authorizations, rights and limitations.

Settings are available through series of Administration screens, described in following chapters.