QRG QT.3 – Approvals & Proposals

Quick Reference Guides · https://milo.masseyservices.com/docs/qrg-qt-3-approvals-proposals/

Approvals

1. Open the Quote needing approval.
2. Click **Preview Approval**.
    - Any approvals needed will be listed on this page.
3. Click **Submit for Approval**.
    - If your quote needs approval from a GM, they will appear in the Approvals Portlet in the Quote.

Proposals

4. Once approved, choose **Generate Quote Proposal**.
5. Wait for **Conga Sign** to gather the information and generate the document and agreements.
6. Once done, scroll down to the Files portlet to check the document before proceeding to Customer signing.



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