Proposals (Accounts) - Updates to Proposal Pre-Authorization and Support for Terms Addendum and Surcharge Rates (16922, 17060, 17082) [New Feature]

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Proposals can now be configured to require either a single pre-authorization or two pre-authorizations before being sent to a customer. Additionally, the Proposal screen has been updated to include settings for Terms Addendum and Surcharge Rates. Below are the setup instructions and requirements for pre-authorizations:

> In both scenarios, the Division's *Cost/Target Pricing* must be defined and the Service Code must have 'Target Pricing (Weight Class)' selected for its Pricing Model. Setup Pathways for both can be found here:
> - *Setup > System > Division*
> - *Setup > Services > Service Code*

Require 1 Approval

For the system to require a single approval before the proposal can be sent to the customer, the following must be true:

- In Setup > Document Formats > Type, the 'Pre-Authorization' field is set to either *"Require Authorization for all Documents"* **OR** *"Require one Authorization for Documents with a rate below Max. Discount."*

Require 2 Approvals

For the system to require two approvals before the proposal can be sent to the customer, the following must be true:

- In Setup > Document Formats > Type, the 'Pre-Authorization' field is set to *"Require two authorizations for Documents with a rate below Medium Weight Target, Addendum Terms, or a Surcharge Rate Override"*

And any two of these are true:

- The Service Fees rate entered by the user is less than the medium weight rate.
- The proposal includes a Terms Addendum. Term Addendums are created in *Setup > Document Formats > Format > Terms Addendums (tab)*.
- The proposal includes a surcharge rate override where the rate is lower than the default rate.

Approval Logic

Pathway: *Setup > System > User*

The system will identify the approver based on the manager listed in the Manager field of the user who drafted the proposal. If a second approval is required, the system will also require approval from the manager of the first approver, as specified in their user profile.