

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

Last Modified on 08/28/2024 1:17 pm EDT

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*

EDIT TERMS CONTRACT - 4000 ? X

Settings Services History ⁷ Attachment Master Agreement **Term Addendums ¹** Surcharge Rates ²

ACCOUNT 49157 / Donut Friend

DOCUMENT FORMAT: Terms Contract | DOCUMENT TYPE: A - New Business PreAuth 2 A | STATUS: Open | SOURCE: []

SALES REP: Aliena Somers - Admin-NS (A) | SOLD BY: PG NAVU (Customer Service) | FORM CONTACT: [] [Linked Leads \(0\)](#)

TITLE: [] | PO NUMBER: []

EFFECTIVE DATE: 08/12/2024 | DELIVERY DATE: 08/12/2024 | ESTIMATED CLOSE DATE: 08/12/2024 | CLOSE PROBABILITY: Medium

TERM: 24 Months | RENEWAL TERM: 12 Months | ANNUAL PRICE INCREASE LIMIT (%): 0 | RATE GUARANTEE (MONTHS): 0

PRINT EST. SURCHARGE: No | PRINT EST. TAX: No | GROUP METHOD: Site | MULTIPLE START DATES: | PRINT EST. WO CHARGES:

NOTE: []

DELIVERY INSTRUCTION: []

PAYMENT REQUIRED AT CUSTOMER SIGNATURE: Not Required

CUSTOM FIELD1 TEXT: [] -

Pre-Authorized by PG 2 at 08/13/2024 5:53 pm

SAVE
PRINT
EMAIL
ACCOUNT SIGNATURE

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 'Reviews and Approvals' field is set to either "Require Approval 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 'Reviews and Approvals' 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.

EDIT USER - 5 - ALIENA SOMERS (ADMIN-NS)
? X

LAST LOGIN Aug 20, 2024 8:23 am

STATUS	<input type="text" value="Active"/>		
FIRST NAME	<input type="text" value="Aliena"/>	DEFAULT HOMEPAGE	<input type="text" value="Recent Activity"/>
LAST NAME	<input type="text" value="Somers"/>	ONLINE IMAGE	<input type="text" value="Select Image..."/> <input type="button" value="BROWSE..."/>
EMAIL	<input type="text" value="aliena@FakeEmail.com"/>		
CELL PHONE	<input type="text" value="(999) 999-9999"/>		
OFFICE PHONE	<input type="text" value="(999) 999-9999"/>		
TITLE	<input type="text" value="Admin-NS"/>		
DEPARTMENT	<input type="text" value="Admin"/>		
MANAGER	<input type="text" value="Scott Smith"/>		
SALES GOAL TYPE	<input type="text" value="Revenue"/>		
EXTERNAL ID	<input type="text"/>		
EXTERNAL USER ID	<input type="text"/>		
DEFAULT APP COLOR	<input type="text" value="Blue"/>	AUTOMATIC COUNTERSIGN	<input type="text" value="No"/>
WORKER COST PER HOUR LEVEL	<input type="text"/>	SIGNATURE IMAGE	<input type="text" value="Select Image..."/> <input type="button" value="BROWSE..."/>