# How to Add Proposal Rules in Sales Automation

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Approval rules should be used if a manager/approval needs to review some/all quotes/proposals based on specific rules, over a certain dollar amount or from a specific group of employees, say new Sales People, etcetera.

Steps listed below are how to setup proposal approval rules that are emailed for an approval review and confirmation before sending to a customer.

## Overview

The steps below are assuming you already have the Departments added. If there are no departments listed, click on that area and add the departments that will be used when using Sales Automation.

## Steps:

Approval Rules:

1. Log into Sales Automation

2. Click on Setup – Proposal Setup – Approval Rules

3. Click on Add General Rule

4. Depending on which parameters are chosen will depend how the rule will be applied. Adding only the Department and no other parameters, the proposals created by that department only regardless of amount or proposal type would need to go through the proposal approval process.

If approval for all departments is needed, no matter what amount or proposal type then the below example would be used.

Only parameter used is Amount = 0.00

5. Click on User Rules to add rules to be applied for specific users. The same rules apply, depending on what

parameters are selected will determine if all or specific types/amounts will apply to the specific user or all.

# Preferences:

1. In Sales Automation, Click on Setup – Preferences

2. When the Preferences window opens, Click on Sales Automation Settings Tab -  fill in the Email that the Completed Proposal Notification will be sent to for approval - Click on Save Button once done

Once both the settings/rules are completed and saved, a new completed proposal will now be sent to the approval email, which was saved in the Preferences Settings, for approval prior to being sent to the customer, depending on the rule parameters that were setup.