



Valuation Services Client Portal

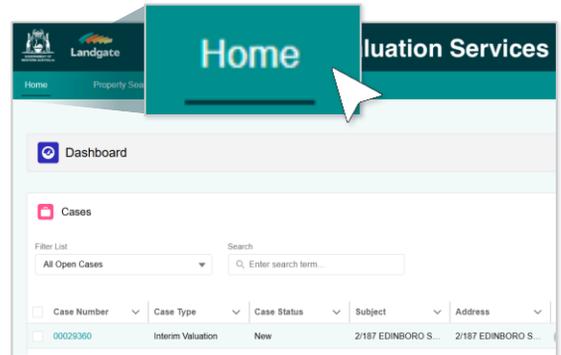
Approving Quotes in the Portal

What is covered in this quick reference guide?

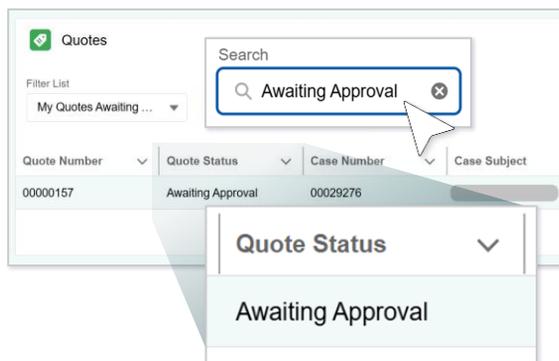
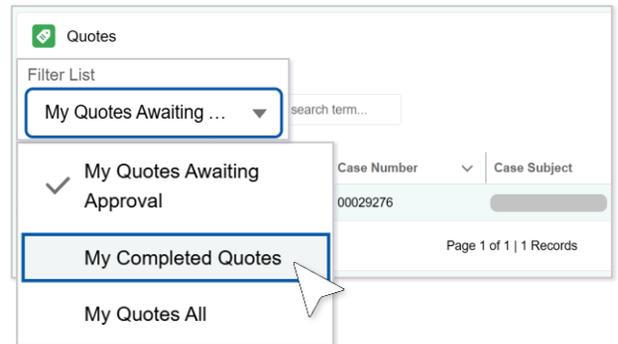
- **Using the Quotes Table** Page 2
- **Viewing a Quote** Page 3
- **Approving or Rejecting a Quote** Page 3

Using the Quotes Table

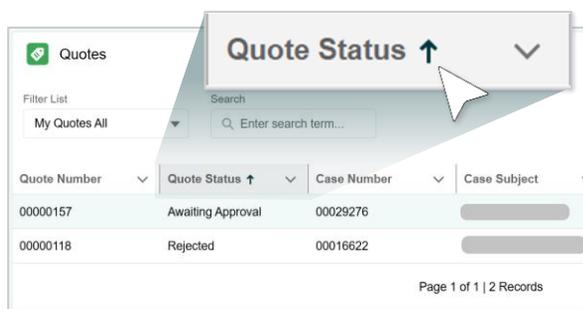
1 Navigate to the **Home dashboard** by clicking on the **Home tab**. The **Quotes table** is at the bottom of the Home dashboard.



2 By default the table will list your **quotes awaiting approval**. Use the **Filter List** field to filter the table by different categories including your completed quotes and all your quotes.

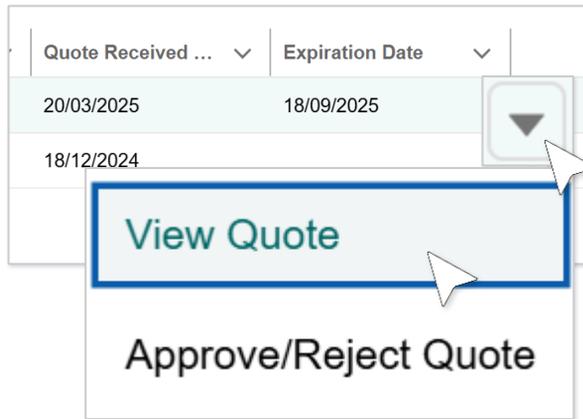


3 Enter a **search term** into the **Search** field to search by any cell in the table.



4 **Sort by a column** in the Quotes table by hovering over a column's header and clicking on the **black arrow** that appears.

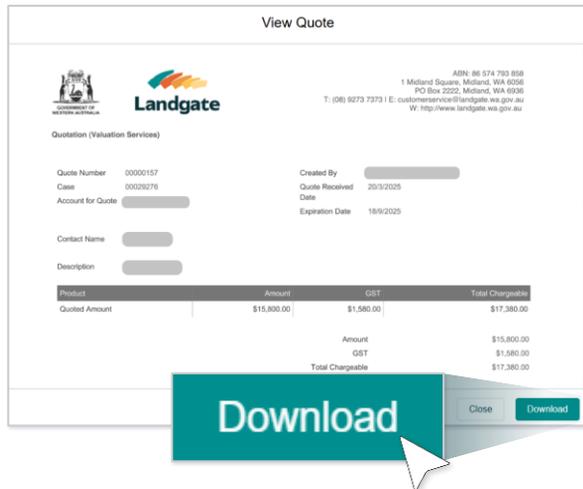
Viewing a Quote



1 In the **Quotes table**, click on the **dropdown arrow** next to a quote.

2 Select **View Quote**.

3 A window with **details of the quote** will appear.



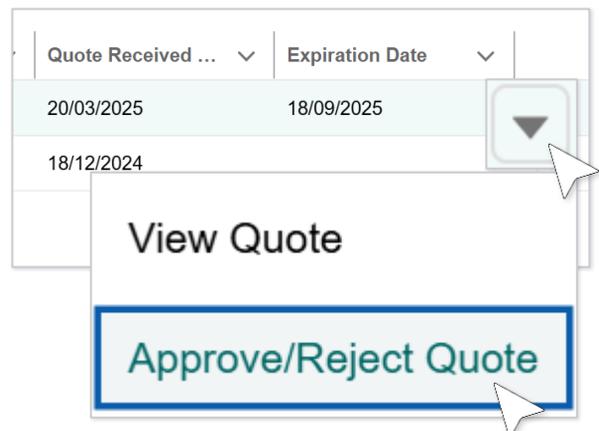
4 Download the quote as a PDF by clicking **Download**.

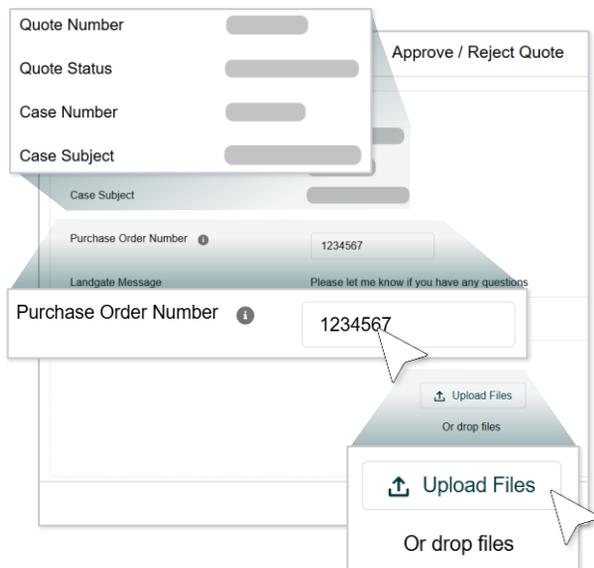
Approving or Rejecting a Quote

1 In the **Cases table**, click on the **dropdown arrow** next to a case.

2 Select **Approve/Reject Quote**.

➔ *Continued on the next page...*





Quote Number [input]
Quote Status [input]
Case Number [input]
Case Subject [input]

Approve / Reject Quote

Case Subject [input]

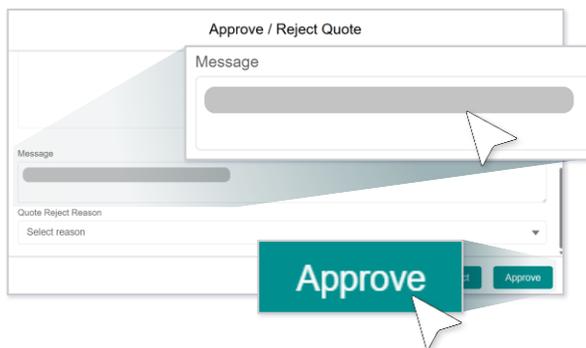
Purchase Order Number [input] 1234567

Landgate Message Please let me know if you have any questions

Purchase Order Number [input] 1234567

Upload Files
Or drop files

Upload Files
Or drop files



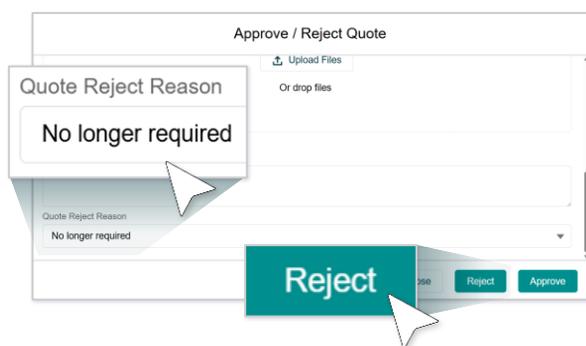
Approve / Reject Quote

Message [input]

Message [input]

Quote Reject Reason
Select reason [dropdown]

Approve



Approve / Reject Quote

Upload Files
Or drop files

Quote Reject Reason
No longer required

Quote Reject Reason
No longer required

Reject

3 Review the quote's details to ensure they are correct.

4 If you are **approving** the quote:

a You may provide or update the **Purchase Order Number**.

b Upload any relevant **attachments** using the **Upload Files button** or by **dragging and dropping files** into the window.

c Add an optional **message**.

d Click **Approve**.

5 If you are **rejecting** the quote:

a Select a **Quote Reject Reason**.

b Click **Reject**.

⚡ **Note:** Approved and rejected quotes will be moved to **My Completed Quotes** in the **Quotes table**.