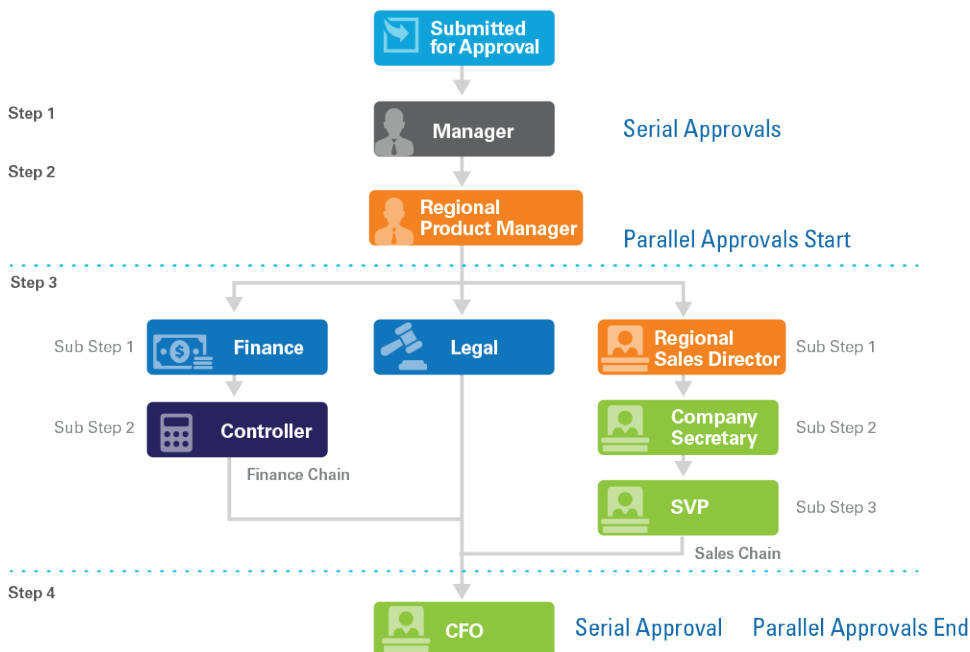


Model N Intelligent Approvals

Get the deal reviewed and approved faster.

Slowing down responsiveness just because the quote requires approval is unacceptable in today's hyper fast business environment. Today's B2B buyers are intolerant of poor experiences. Slow responsiveness to getting that quote to the buyer could cost not only this deal, but future deals as well.



Model N Intelligent Approvals does the work to accelerate approval workflows and responsiveness. By bringing together customer, sales teams, sales operations, administrators, managers and compliance perspectives, Model N Intelligent Approvals ensures your sales team is first with a quote, even when it requires a complex approval workflow.

Benefits:

- Accelerate responsiveness - be first with a quote
- Dynamic configuration for instant adjustment to unique requirements
- Support simple to complex workflows
- Simplify maintenance - administer in Salesforce
- Use as your single approval workflow solution



Features:

- Independent of standard Salesforce approvals
- Instantly trigger serial and parallel paths
- Line-level approvals
- Preview before initiating approval
- Dynamically re-assign or add approvers
- Track approval status
- Approval Matrix simplifies maintenance
- Approval Memory keeps the process moving
- Review, approve/reject in Chatter
- Available across all Revenue Cloud applications

How it works

INTUITIVE INTERFACE

Administrators will be able to instantly start using Model N Intelligent Approvals with its intuitive, modern interface.

TRIGGER SERIAL AND PARALLEL PATHS

Now Sales Operations can design approval workflows that meet the unique requirements of your business processes.

PREVIEW BEFORE INITIATING APPROVAL

Provide Sales reps with visibility to the proposed approval workflow enabling them to proactively take action that ensures the fastest, most appropriate process.

Entry Criteria Save Save & Close

Entry Criteria Conditions

*Field *Operator *Compare *Value Add Condition

FIELD	OPERATOR	VALUE
1 QuoteLinesMaxDiscount	>	10

Logic

Conditions Logic

AND

OR

Advanced (Use AND / OR)

Advanced Logic

1

> Formula Examples

Approval Process Definitions > Standard Quote Approval Process

Approval Steps New

4 Items - Sorted by Sequence - Updated a few seconds ago

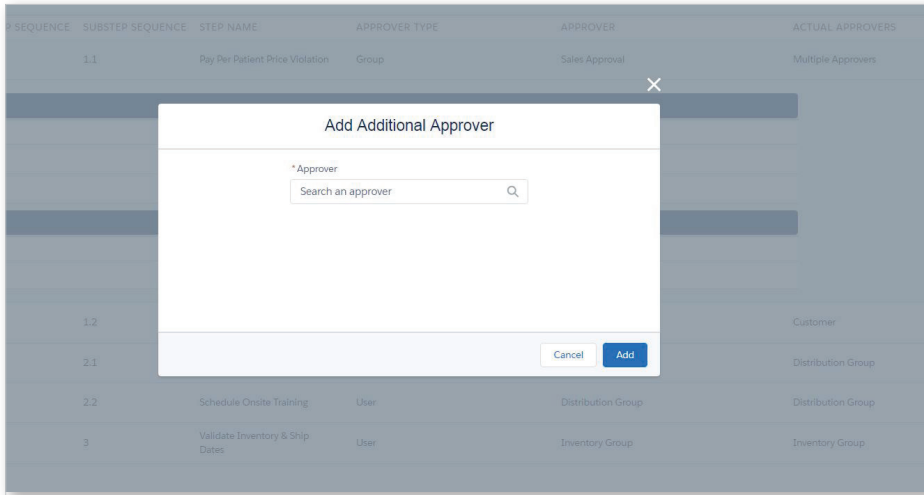
<input type="checkbox"/>	STEP NAME	APPROVER TYPE	APPROVER	TYPE	SEQUENCE	
<input type="checkbox"/>	Sales Lead	Matrix	Sales Leads - Business Units	Main	1	
<input type="checkbox"/>	Finance	Role	Finance Mgr	Main	2	
<input type="checkbox"/>	Legal	Role	Legal Mgr	Main	2	
<input type="checkbox"/>	VP of Sales	Role	VP Sales	Main	3	

QUOTE > QUOTE FOR GL1 SYSTEMS

Review Approval Go back Recall Submit

5 Items Sorted by Step

ADD	STATUS	STEP SEQUENCE	SUBSTEP SEQUENCE	STEP NAME	APPROVER TYPE	APPROVER	ACTUAL APPROVERS
<input type="checkbox"/>	<input checked="" type="checkbox"/>	1	1.1	Pay Per Patient Price Violation	Group	Sales Approval	Multiple Approvers
<input type="checkbox"/>	<input checked="" type="checkbox"/>	1	1.2	Price Negotiation/ Customer Signature	User	Customer	Customer
<input type="checkbox"/>	<input checked="" type="checkbox"/>	2	2.1	Schedule Installation	User	Distribution Group	Distribution Group
<input type="checkbox"/>	<input checked="" type="checkbox"/>	2	2.2	Schedule Onsite Training	User	Distribution Group	Distribution Group
<input type="checkbox"/>	<input checked="" type="checkbox"/>	3	3	Validate Inventory & Ship Dates	User	Inventory Group	Inventory Group



ADD OR REASSIGN APPROVERS DYNAMICALLY
 Now Sales Operations can enable approvers and sales reps with the ability to instantly include subject matter expert(s) to ensure the accuracy of the decision, especially for unique cases, without having to redesign the approval workflow.

Review Approval
 5 Items Sorted by Step

STATUS	STEP SEQUENCE	SUBSTEP SEQUENCE	STEP NAME	APPROVER TYPE	APPROVER
✓	1	1.1	Pay Per Patient Price Violation	Group	Sales Approval
⚙️	1	1.2	Price Negotiation: Customer Signature	User	Customer
ⓘ	2	2.1	Schedule Installation	User	Distribution Group
ⓘ	2	2.2	Schedule Onsite Training	User	Distribution Group
ⓘ	3	3	Validate Inventory & Ship Dates	User	Inventory Group

TRACK APPROVAL STATUS
 Give Sales reps instant visibility into exactly where the request is in the approval process.

APPROVAL MATRIX
 Sales Director Region

DETAILS VARIABLES MATRIX

→ Add a variable

	Territory Region	APPROVER TYPE	APPROVER
▼	= Eastern	Role	Sales Director Eastern X
▼	= Western	Role	Sales Director Western X
▼	= Northern	Role	Sales Director Northern X

↓ Add a value

APPROVAL MATRIX
 Model N's unique approach enables easy maintenance and administration of the approvers, even for condition-based workflows.

QUOTE > HARDWARE PURCHASE
Manage Approvals
 1 Item Sorted by Date

Current Approvals

STATUS	STEP SEQUENCE	SUBSTEP SEQUENCE	STEP NAME	TYPE	DATE	ASS
	2		Scheduled Installation	Main	02/14/2018 7:01 PM	Rep

Approval History

STATUS	STEP SEQUENCE	SUBSTEP SEQUENCE	STEP NAME	TYPE	DATE
	1	2	Price Negotiation: Customer Signature	Main	02/14/2018 7:00 PM
	1	2	Price Negotiation: Customer Signature	Main	02/14/2018 7:00 PM
	1	1	Pay Per Patient Price Violation	Main	02/14/2018 7:00 PM
					02/14/2018 7:01 PM
	2		Scheduled Installation	Main	02/14/2018 7:00 PM
	1	1	Pay Per Patient Price Violation	Main	02/14/2018 7:00 PM
	1	2	Price Negotiation: Customer Signature	Main	02/14/2018 7:00 PM
	1	2	Price Negotiation: Customer Signature	Main	02/14/2018 7:00 PM
					02/14/2018 6:59 PM

APPROVAL MEMORY

Keep the process moving even for rejections, when the key components of the deal do not change.

Approval Process Definition
Standard Quote Approval Process

RELATED DETAILS

Entry Criteria (1)

NAME	TARGET FIELD	OPERATOR	VALUE
Quote Approval Process 3.0 - Rul...	QuoteLinesMaxDiscount_...	>	10

View All

Approval Steps (4)

STEP NAME	APPROVER TYPE	APPROVER	TYPE
Sales Lead	Matrix	Sales Leads - Business Units	Main
Finance	Role	Finance Mgr	Main
Legal	Role	Legal Mgr	Main
VP of Sales	Role	VP Sales	Main

View All

Actions (6+)

USE AS YOUR APPROVAL WORKFLOW SOLUTION

Replace standard workflow capabilities with more capable, flexible solution.

Intelligent Approvals - another example of how Model N is the platform for Digital Reinvention.

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