Introduction Letter Inbox

Module Guide: Introduction Letter Inbox

Module Location

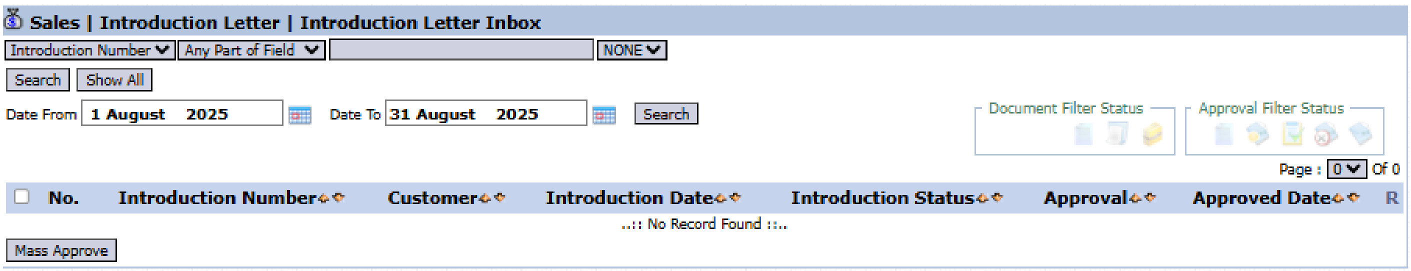
Sales > Introduction Letter > Introduction Letter Inbox

Module Objective

The **Introduction Letter Inbox** module serves as the approval center for all Introduction Letter documents that have been created and submitted by the sales team. This module is used by a superior or manager to conduct a final review and provide approval before the letter is finalized and sent to the customer.

1. Main View (Letter List)

The main page of this module is an "inbox" that displays all Introduction Letters requiring your action.



View Explanation & Filters

This page provides a summary of all introduction letters that are awaiting approval.

- **Filters**: You can search for a specific letter by **Introduction Number** or a **Date From** and **Date To** range. You can also filter by **Document Filter Status** and **Approval Filter Status**.

- **Request List**: The table below will display all letters awaiting action. The table currently shows "...No Record Found...".

Column Explanation

- **Introduction Number**: The unique number of the submitted Introduction Letter document.
- **Customer**: The name of the customer to whom the letter is addressed.
- **Introduction Date**: The date the letter was created.
- **Introduction Status / Approval**: Icons that indicate the document's status and the approval process status.

Button Functions

- **Need Approve**: The main action button to process the approval for a selected introduction letter.

2. Approval Process Steps

The following is the standard workflow for an approver.

Step 1: Access the Inbox

Open the **Introduction Letter Inbox** module to see the list of letters that require approval.

Step 2: Review Introduction Letter Details

Click on one of the rows in the table to open its detail view. In the detail view, you can read the full content of the letter and check the correctness of the recipient's data.

Step 3: Provide Approval

After you have reviewed and are certain about the submitted letter's content:

1. Return to the main **Inbox** page.
2. Check the box in the leftmost column for one or more letter rows you wish to approve.
3. Click the **Need Approve** button located in the bottom-left section of the page to process the approval. 

3. Workflow & Integrated Business Process

1. **Submission**: A salesperson creates a letter in the **Introduction Letter** module and clicks **Confirm**.
2. **Entering the Queue**: The confirmed letter automatically enters the queue in this **Introduction Letter Inbox** module.
3. **Review & Approval**: A manager or approver opens this module, reviews, and provides approval.
4. **Finalization**: After approval, the Introduction Letter becomes an official document and is ready to be printed via the **Introduction Letter** module to be sent to the customer.

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