

QuoteFlow

User manual

3 October 2026

<https://qtflo.com> · <https://docs.qtflo.com>

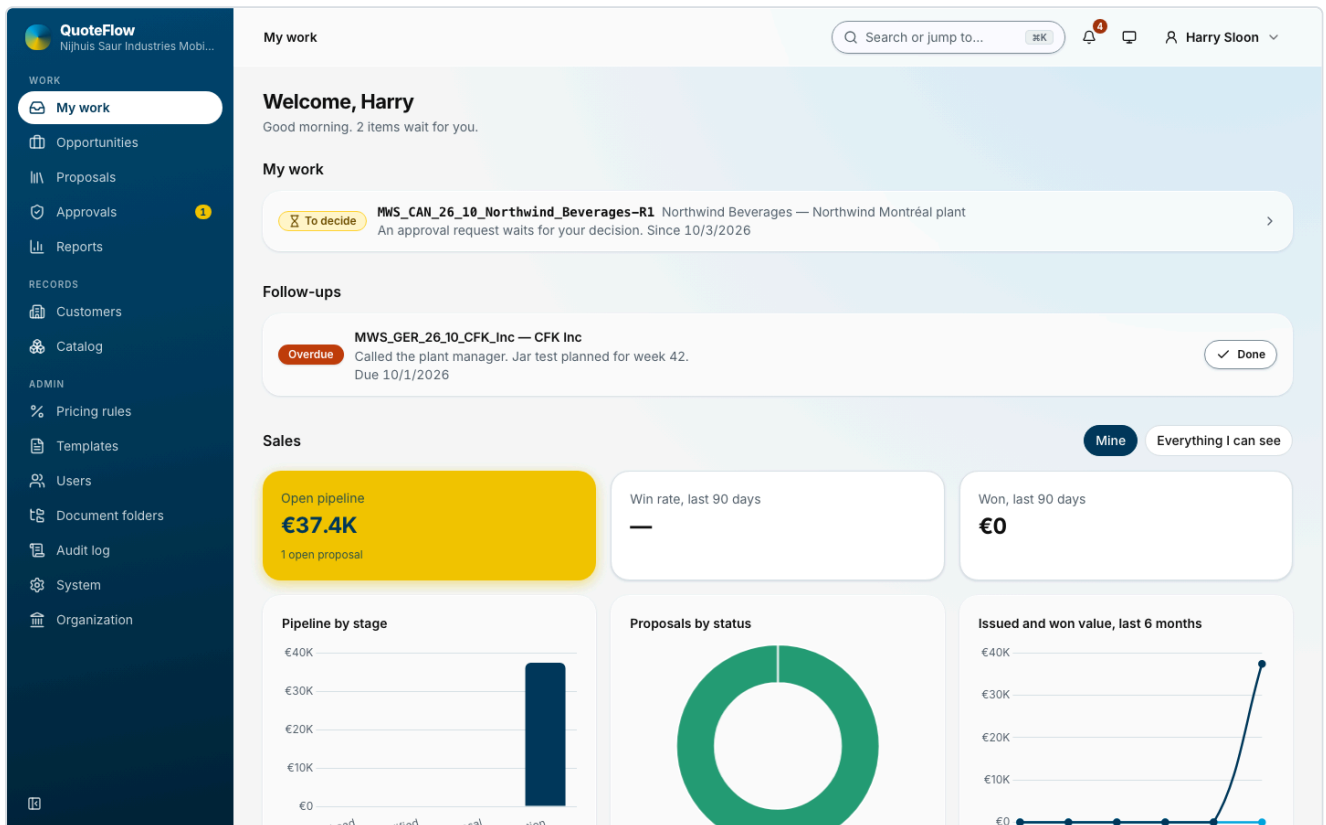
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QuoteFlow manual

QuoteFlow is where a salesperson records a customer's need and water analysis, builds a priced proposal from the catalogue under the company's pricing rules, gets a discount approved, and issues a Word and PDF document in the company's own look. It is also the light CRM: customers, contacts, activities and follow-ups, the pipeline, the lost reasons.

This manual follows that order. Each page shows the screen it describes. The whole manual is also one file to send on: [QuoteFlow-manual.pdf](#).



Who does what

Role	May
Sales	See and edit customers; create and edit opportunities in their region or country; build and issue proposals; request discount approval.
Commercial admin	Set list prices and pricing rules; decide discount approvals; see opportunities in their scope; hand an opportunity to another owner.
Operations manager	See opportunities in their scope; decide discount approvals.
Content admin	Maintain the catalogue (equipment, services, datasheets, photos) and the proposal templates.
Super admin	Users and roles, organisation settings, audit log, system; hand an opportunity to another owner. Holds no commercial rights.

A role is held for the whole company, one region or one country. An opportunity in a region you hold no role in does not exist for you: it is not listed, and its address answers "not found".

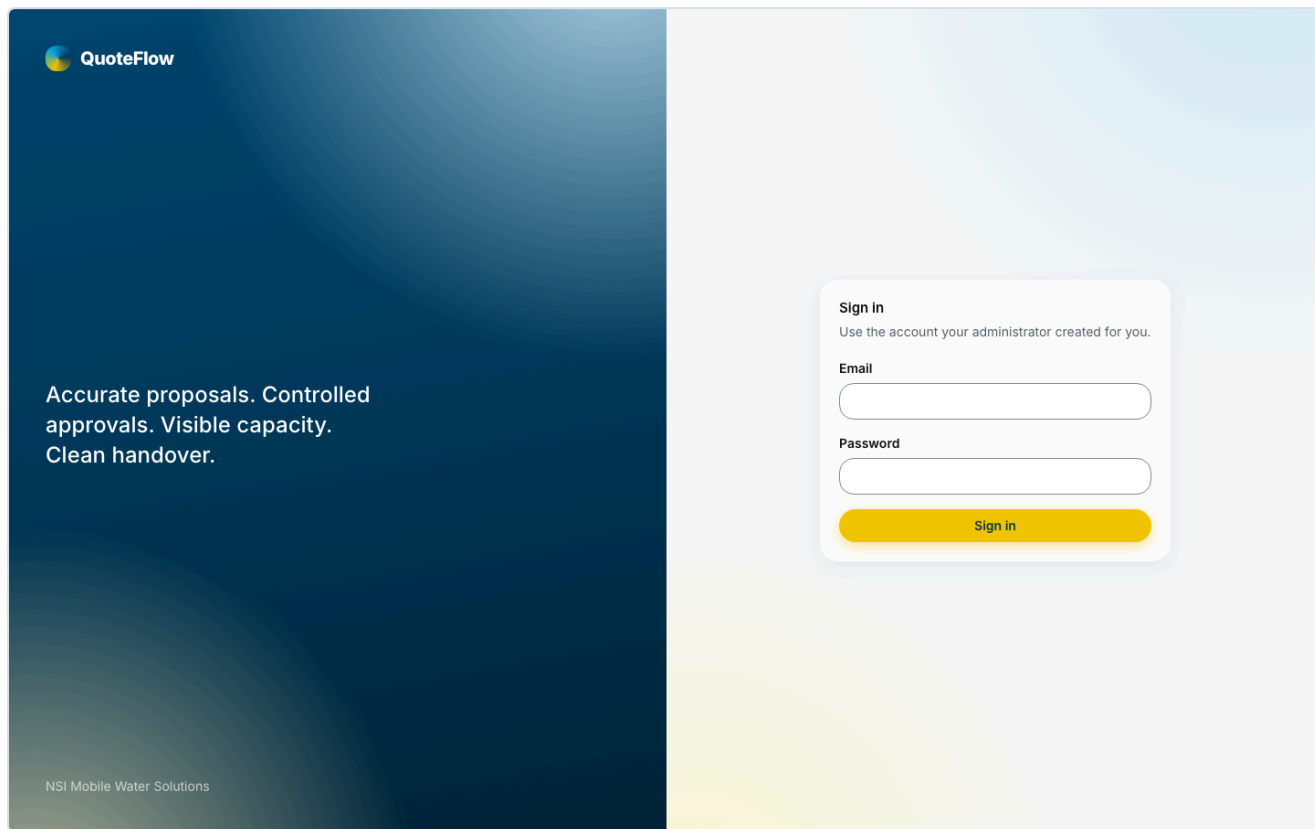
The path of a proposal

1. A customer with a contact.
2. An opportunity: the site, the intervention, the water application, the period.
3. The water data: the customer's analysis and the treatment goal.
4. The proposal: options and lines, texts, pricing.
5. Approval of any discount above the salesperson's authority.
6. The document: preview, mark ready, issue. The Word and PDF files land in the opportunity's folder.

Everything else (catalogue, pricing rules, templates, administration) is set up once by the administrators and used every day by the rest.

Sign in and roles

Open the app's address, <https://qtflo.com>, and sign in with your email and password.



Your account

New accounts arrive as an invitation link from an administrator; the link asks you to set a password once. If no mail reaches you, the administrator can copy the link from the Users page and send it another way.

Account (your name, top right) holds your name, job title and phone, which print on the proposals you issue, and your password. Change the password you were given on first use.

QuoteFlow
Nijhuis Saur Industries Mobi...

Account

Search or jump to... 🔍

Account

Profile

Name: Claire Tremblay
Email: claire.tremblay@waterrentalcompany.com

On your proposals

Proposals you own name you as their sender, with these beside your name and email. Both are optional.

Job title: Sales Engineer, Mobile Water Solutions Co
Phone: +1 519 555 0142

Save

Change password

Changing your password signs you out everywhere, including here.

Current password:

New password:

At least 12 characters. A short sentence works well.

Confirm new password:

Change password

Roles and scope

What you see depends on your roles. Each is held for the whole company, one region or one country:

- **Sales** works customers and opportunities in their scope and issues proposals.
- **Commercial admin** sets prices and rules and decides approvals.
- **Operations manager** decides approvals and reads opportunities.
- **Content admin** keeps the catalogue and the templates.
- **Super admin** keeps users, the organisation and the system.

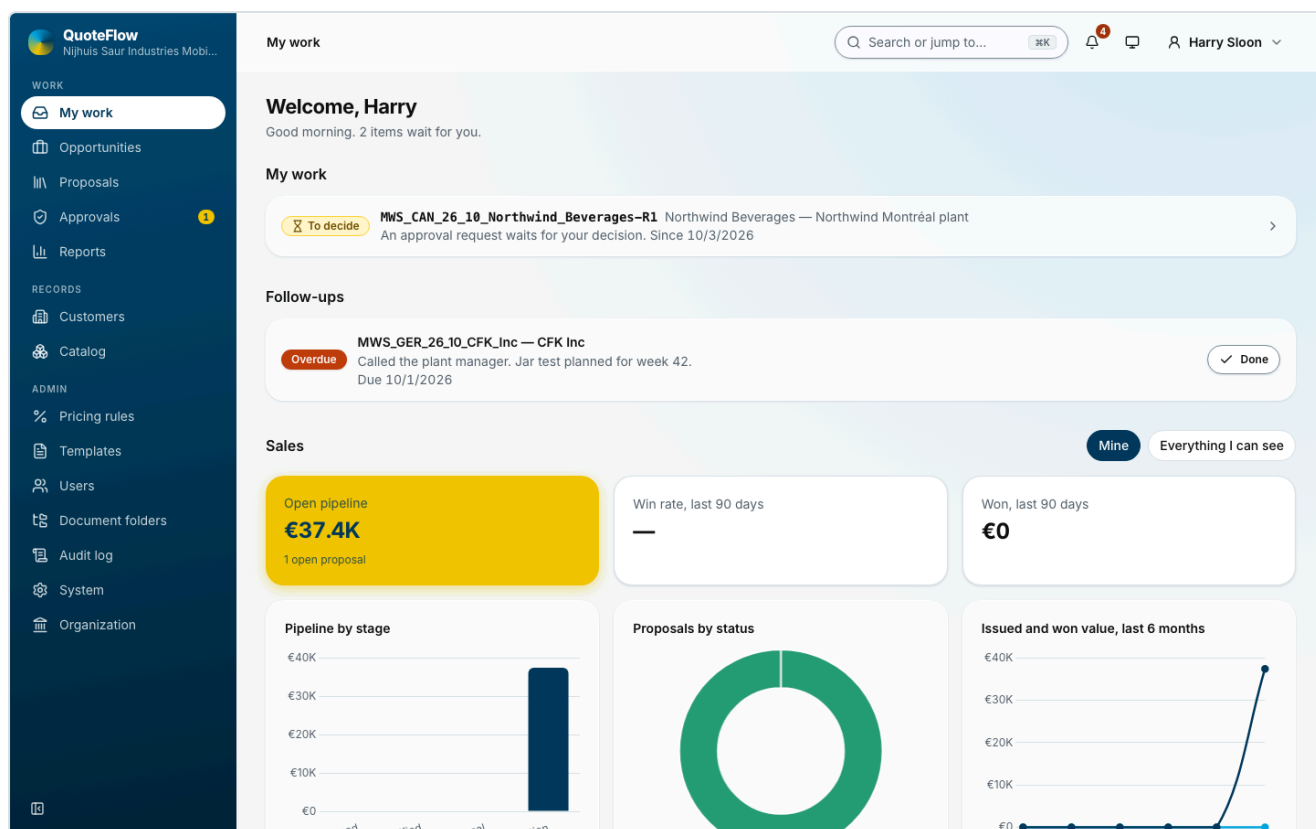
An opportunity outside your scope is not shown anywhere, and its address answers "not found". The database enforces the same rule behind the application.

Signing out

Sign out is under your name. A session ends by itself after a long time without use; signing in again continues where you were.

My work

The home page after sign-in: what waits for you, your follow-ups, and the sales figures of what you can see.



What waits for you

The list at the top names the proposals that need you: an approval to decide, a proposal about to expire, a draft that has not moved for a while, a decision that came back. Each row opens the proposal.

Follow-ups

Your open follow-ups from the activities you logged or were handed, the earliest first, with **Done** to close one. An overdue follow-up is marked.

Sales

Mine shows your own opportunities; **Everything I can see** the whole scope of your roles. Open pipeline, win rate and value won over the last 90 days, the pipeline by stage, the proposals by status, and issued and won value over six months. Click a tile to open the list behind it.

Notices

The bell holds the notices sent to you: a proposal expiring, a template retired, a catalogue price changed on one of your drafts, new pricing rules, a follow-up handed to you, an approval decided. A notice opens what it is about.

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WORK

My work

Opportunities

Proposals

Approvals

Reports

RECORDS

Customers

My work

Search or jump to... [XK]

1

Claire Tremblay

Notifications

Mark all read

The approval of MWS_CAN_26_10_Maple_Ridge_Dairy_Cooperative-R1 is decided: 2 approved, 0 at a lower maximum, 0 rejected.

Oct 2, 2026, 9:53 PM

Welcome, Claire

Good morning. 1 item waits for you.

My work

Needs approval

MWS_CAN_26_10_Northwind_Beverages-R1

Northwind Beverages

A line needs approval. Request it to go on. Since 10/3/2026

Follow-ups

Upcoming

MWS_CAN_26_10_Maple_Ridge_Dairy_Cooperative — Maple Ridge Dairy Cooperative

Alan Fraser called: the plant's RO failed, tankered water covers them until 7 October. He needs a price today.

Due 10/5/2026

Done

Upcoming

MWS_CAN_26_10_Northwind_Beverages — Northwind Beverages

Met Sophie Marchand at the plant. Peak season December to February; the plant's own softener is at its limit.

Due 10/10/2026

Done

Sales

Open pipeline

€230.3K

2 open proposals

Win rate, last 90 days

—

Won, last 90 days

€0

Pipeline by stage

€150K

€100K

Proposals by status

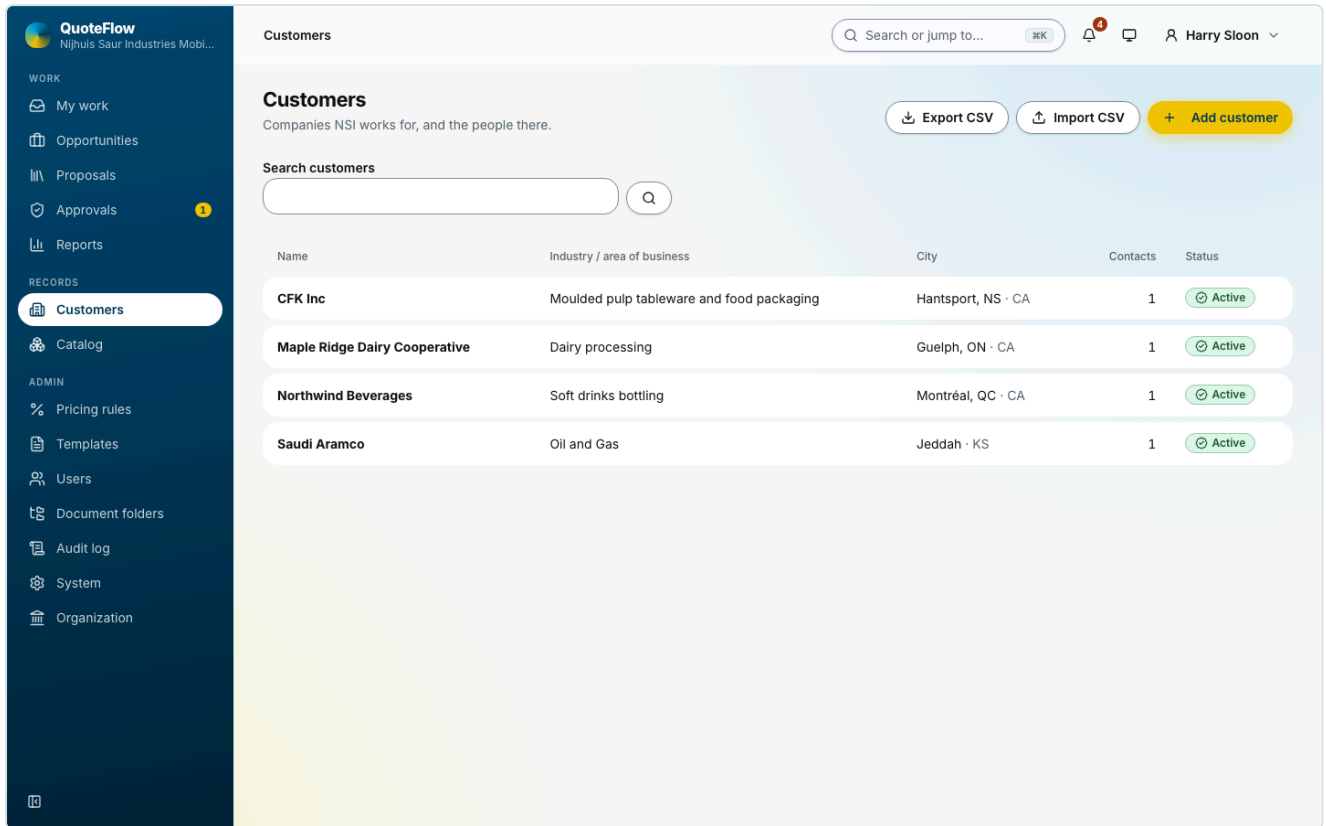
Issued and won value, last 6 months

€100K

€50K

Customers and activities

Customers lists every customer with its industry, place and open opportunities.



The screenshot displays the 'Customers' section of the QuoteFlow application. On the left is a dark blue sidebar with navigation links under 'WORK' (My work, Opportunities, Proposals, Approvals, Reports) and 'RECORDS' (Customers, Catalog). Below these are 'ADMIN' links (Pricing rules, Templates, Users, Document folders, Audit log, System, Organization). The main content area has a header with a search bar, a user profile for Harry Sloon, and buttons for 'Export CSV', 'Import CSV', and 'Add customer'. Below the header is a 'Search customers' input field. The main part of the page is a table listing customers.

Name	Industry / area of business	City	Contacts	Status
CFK Inc	Moulded pulp tableware and food packaging	Hantsport, NS · CA	1	Active
Maple Ridge Dairy Cooperative	Dairy processing	Guelph, ON · CA	1	Active
Northwind Beverages	Soft drinks bottling	Montréal, QC · CA	1	Active
Saudi Aramco	Oil and Gas	Jeddah · KS	1	Active

A customer

A customer has a name, industry, address, classification, notes and contacts. Its page shows its opportunities and what they add up to, its contacts, and its activities.

QuoteFlow

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WORK

My work

Opportunities

Proposals

Approvals

Reports

RECORDS

Customers

Catalog

ADMIN

Pricing rules

Templates

Users

Document folders

Audit log

System

Organization

Customer

Search or jump to...

4

Harry Sloon

All customers

Maple Ridge Dairy Cooperative

Active

Industry / area of business

Dairy processing

City

Guelph, ON

Country code

CA

Contacts

1

Open opportunities

1

Open value

€82.7K

Won value

€0

Last activity

10/2/2026

Opportunities

Reference	Site / project name	Stage	Owner	Value	Status
MWS_CAN_26_10_Maple_Ridge_Dairy_Cooperative	Maple Ridge Guelph plant	Proposal	Claire Tremblay	€82,708.00	Open

Only the opportunities in your regions are listed.

Activities

Kind

Call

Date

03.10.2026

Follow up on

dd.mm.yyyy

Optional. It shows on My Work until done.

What happened

Log

Call

Claire Tremblay, 10/2/2026

MWS_CAN_26_10_Maple_Ridge_Dairy_Cooperative

Alan Fraser called: the plant's RO failed, tankered water covers them until 7 October. He needs a price today.

Follow-up 10/5/2026

Details

Name

Maple Ridge Dairy Cooperative

Industry / area of business

Dairy processing

Street

480 Stone Road West

Postal code

N1G 4Y2

City

Guelph, ON

Country code

CA

Two letters, for example NL.

Internal only

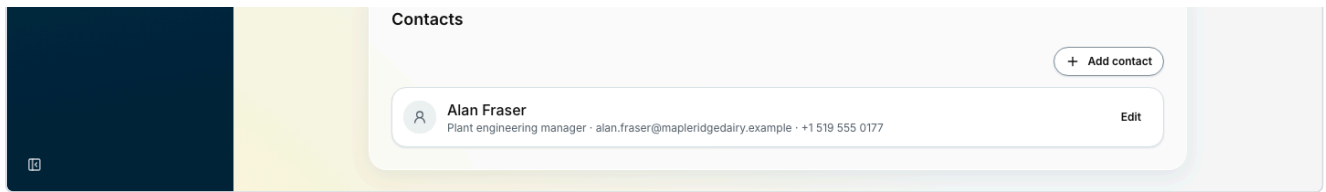
Internal classification

Internal notes

Invented customer for the second example.

Active

Save details



Activities

Activities are the CRM: a call, meeting, email or note, dated, with a follow-up date when something is to be done and an owner for that follow-up. The owner is yourself, or a colleague who can see the opportunity. Follow-ups appear on [My work](#); the owner is told the day it falls due.

Log activity on a customer's or an opportunity's page opens the form: kind, date, what was said, and the follow-up date and owner.

Anyone who can see an activity's opportunity and edit customers may read and log activities; only the author edits or deletes one.

Export and import

The Customers page exports every customer with its contacts as CSV, and imports a CSV after a dry run that shows what would be added or changed before anything is written.

Opportunities

An opportunity is one request from one customer: a site, a location, the intervention type (planned, emergency, multi-year), the water application, the water source, the sales region and country, the expected order date, the rental period (start and end, or "to be determined"), a stage and a probability. The reference is generated from the organisation's pattern, for example `MWS_GER_26_10_CFK_Inc`.

The screenshot displays the 'Opportunities' section of the QuoteFlow application. The interface includes a dark blue sidebar on the left with navigation options under 'WORK', 'RECORDS', and 'ADMIN'. The main content area has a header with the 'Opportunities' title, a search bar, and a user profile 'Harry Sloon'. Below the header, there are tabs for 'Table', 'Board', and 'All statuses', along with buttons for 'Open', 'Won', 'Lost', and 'On hold'. A search bar for 'Search by reference, customer or site' is also present. The table lists four opportunities with their respective details and an 'Open' button for each.

Reference	Customer	Intervention type	Stage	Owner	Status
MWS_CAN_26_10_Northwind_Beverages	Northwind Beverages Northwind Montréal plant · AMER/CA	Planned	Qualified	Claire Tremblay	Open
MWS_GER_26_10_Saudi_Aramco	Saudi Aramco Saudi Aramco DCP · EMEA/DE	Planned	Proposal	Jonas Weber	Open
MWS_CAN_26_10_Maple_Ridge_Dairy_Cooperative	Maple Ridge Dairy Cooperative Maple Ridge Guelph plant · AMER/CA	Emergency	Proposal	Claire Tremblay	Open
MWS_GER_26_10_CFK_Inc	CFK Inc CFK Hantsport · EMEA/DE	Planned	Negotiation	Harry Sloon	Open

A new opportunity

New opportunity asks for the customer and contact, the sales region and country, the site, the requested period, the intervention type, the water application and the expected order date. The reference is given when the opportunity is created.

New opportunity

The reference number is issued when you create it.

Customer: Choose... Sales region: Choose... Country: Choose...

Customer-facing: Appears in proposal

Site / project name: Project location:

Contact: No contact Requested start: dd.mm.yyyy Requested end: dd.mm.yyyy

☐ The rental period is to be determined

Internal only

Intervention type: Planned Water application:

Water source: Opportunity source:

Stage: Probability (%):

Cancel Create

The board

View: Board shows the open opportunities by stage: lead, qualified, proposal, negotiation. Drag a card to the next stage. Each column heads with its count and value.

Opportunities

Every request you may see, newest first.

Export CSV New opportunity

Table Board Search by reference, customer or site

Open opportunities by stage. Drag a card you own to another stage, or use its Stage list.

Lead · 0	Qualified · 1	Proposal · 2	Negotiation · 1
None	MMS_CAN_26_10_Northwind_Beverages Northwind Beverages Northwind Montréal plant · Claire Tremblay €147,570.00 Expected 11/15/2026	MMS_GER_26_10_Saudi_Aramco Saudi Aramco Saudi Aramco DCP · Jonas Weber €26,700.00 Expected 2/18/2028 MMS_CAN_26_10_Maple_Ridge_Dairy_Cooperative Maple Ridge Dairy Cooperative Maple Ridge Guelph plant · Claire Tremblay €82,708.00 Expected 10/5/2026	MMS_GER_26_10_CFK_Inc CFK Inc CFK Hantsport · Harry Sloon €37,420.00 Expected 10/31/2026 Negotiation

An opportunity's page

The screenshot shows the 'Opportunity' page in the QuoteFlow application. The left sidebar contains navigation links for WORK (My work, Opportunities, Proposals, Approvals, Reports), RECORDS (Customers, Catalog), and ADMIN (Pricing rules, Templates, Users, Document folders, Audit log, System, Organization). The main content area is titled 'Opportunity' and shows details for 'Northwind Beverages — Northwind Montréal plant'. It includes a search bar, a user profile (Harry Sloan), and buttons for 'Open', 'Reassign owner', and 'Open proposal'. Below these are four summary cards: Sales region (AMER/CA), Owner (Claire Tremblay), Probability (%) (60), and Requested start (12/1/2026). The 'General information' section contains a note about editing permissions and a 'Customer-facing' toggle. It also includes fields for Site / project name, Project location, Contact, Requested start, Requested end, and an option for 'The rental period is to be determined'. An 'Internal only' section contains fields for Intervention type, Water application, Water source, and Opportunity source.

QuoteFlow
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Opportunity

Search or jump to... 🔍

🔔 4 🖨️ 👤 Harry Sloan ▾

← All opportunities

Northwind Beverages — Northwind Montréal plant 🔗 Open

MWS_CAN_26_10_Northwind_Beverages

👤 Reassign owner 📄 Open proposal

Sales region
AMER/CA

Owner
Claire Tremblay

Probability (%)
60

Requested start
12/1/2026

General information

Only the owner can edit this opportunity.
Customer, region and country are fixed once the opportunity exists.

Customer-facing Appears in proposal

Site / project name
Northwind Montréal plant

Project location
Montréal, QC

Contact
Sophie Marchand ▾

Requested start
01.12.2026

Requested end
28.02.2027

☐ The rental period is to be determined

Internal only

Intervention type
Planned ▾

Water application
Process water ▾

Water source
Municipal water

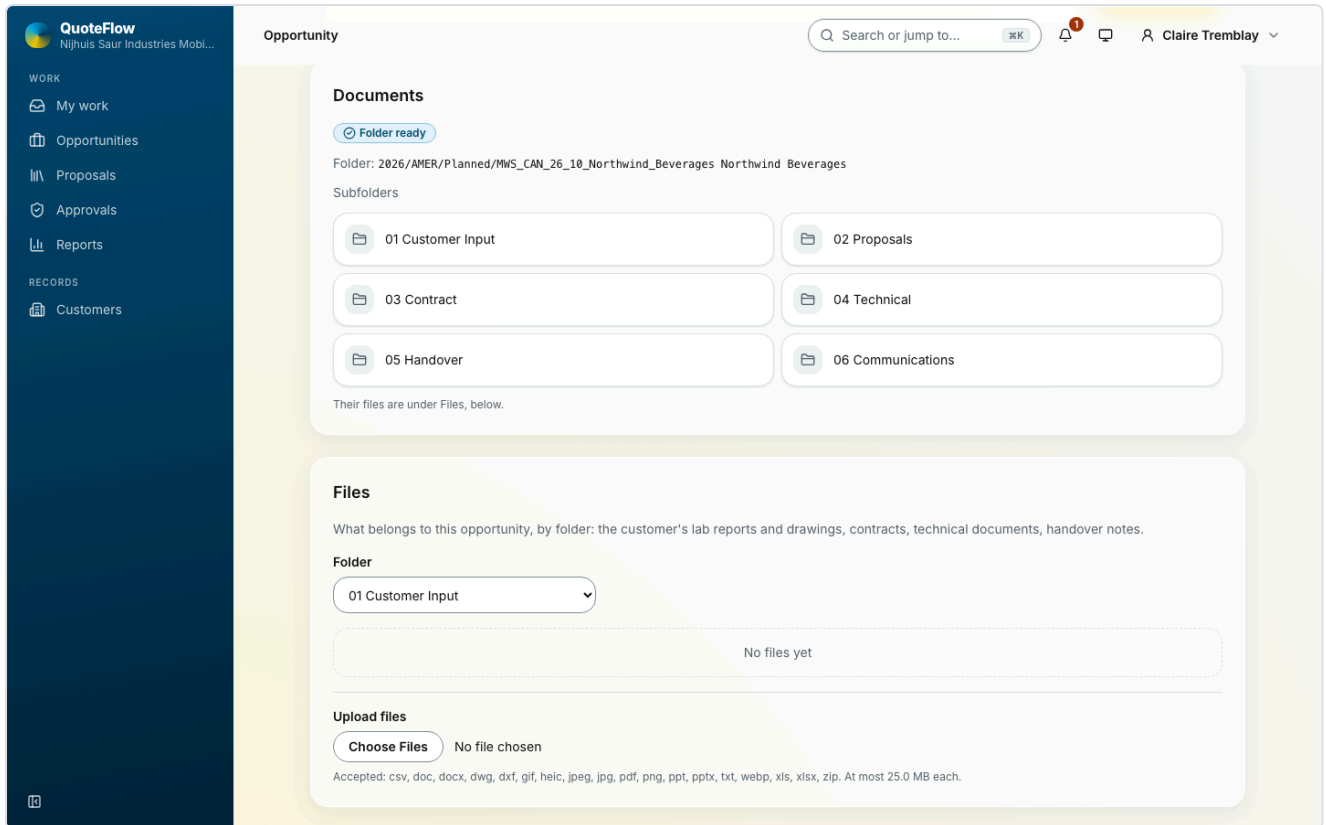
Opportunity source
Trade fair

The page holds the general data, the water data and treatment goal, the files, the proposal and the activities.

Closing an opportunity as **won** or **lost** happens here. A loss asks for its reason (price, competitor, timing, no budget, no decision, other) and an optional note; the reports count the reasons.

Files

The opportunity's folders: 01 Customer Input, 02 Proposals, 03 Contract, 04 Technical, 05 Handover, 06 Communications, as the administrator names them. Pick a folder, upload into it, download from any. Issued proposals land in 02 Proposals by themselves.



Owner and reassignment

The owner edits an opportunity, its water data and its proposal. A super admin or commercial admin can **reassign** it to another salesperson; the new owner is told.

Water data

The customer's analysis of the inlet water and the treatment goal, entered on the opportunity's page. The parameters asked are those the content admin defined for the water application ([Catalog](#), [Water parameters](#)); a required parameter needs a value or a waiver with a reason before the proposal can be marked ready.

Water data and treatment goal

✓ Complete

Enter what the customer supplied: a value, a maximum, both, or words such as "not measured". Only the parameters for this water application are asked; a required value can be waived with a reason. A row without a value is not printed.

Only the owner can edit the water data.

☑ All required values entered

Inlet water

Parameter	Value	Maximum	Status	Source of the value	In proposal
Flow Required ≥ 0 m³/h	18		Measured ▾	Municipal report ↕	✓
Design flow ≥ 0 m³/h			Measured ▾	e.g. Lab report 20	✓
Peak flow ≥ 0 m³/h			Measured ▾	e.g. Lab report 20	✓
Operating hours 0–24 h/day			Measured ▾	e.g. Lab report 20	✓
Temperature 0–100 °C	14		Measured ▾	Municipal report ↕	✓
Conductivity ≥ 0 µS/cm	420		Measured ▾	Municipal report ↕	✓
TDS ≥ 0 mg/L			Measured ▾	e.g. Lab report 20	✓
Total hardness ≥ 0 mg/L CaCO ₃	180		Measured ▾	Municipal report ↕	✓
Alkalinity ≥ 0 mg/L CaCO ₃			Measured ▾	e.g. Lab report 20	✓
pH Required 0–14	7.6		Measured ▾	Municipal report ↕	✓
Silica ≥ 0 mg/L SiO ₂			Measured ▾	e.g. Lab report 20	✓
Turbidity ≥ 0 NTU	0.8		Measured ▾	Municipal report ↕	✓
Iron ≥ 0 mg/L			Measured ▾	e.g. Lab report 20	✓
Manganese ≥ 0 mg/L			Measured ▾	e.g. Lab report 20	✓
Silt density index (SDI) ≥ 0	not measured		Measured ▾	e.g. Lab report 20	✓
Microbiological or special contaminants			Measured ▾	e.g. Lab report 20	✓
Chloride	35	60	On this opportunity only		✓
mg/L					

Treatment goal

Parameter	Value	Status	Source of the value	In proposal
Target product flow ≥ 0 m³/h	15	Measured ▼	e.g. Lab report 2026-09	✓
Product water conductivity ≥ 0 µS/cm	10	Measured ▼	e.g. Lab report 2026-09	✓
Product water turbidity ≥ 0 NTU		Measured ▼	e.g. Lab report 2026-09	✓
Contaminant removal goals		Measured ▼	e.g. Lab report 2026-09	✓
Reuse requirements		Measured ▼	e.g. Lab report 2026-09	✓
Continuity and redundancy requirements		Measured ▼	e.g. Lab report 2026-09	✓
Site constraints		Measured ▼	e.g. Lab report 2026-09	✓

One row

- **Value:** a number (the typical or average figure), or words where the customer gave none: "not measured", "< 0.1".
- **Maximum:** beside the number, for the inlet water. An average alone, or an average and a maximum; the document prints the Maximum column only when a printed parameter has one.
- **Status:** measured, estimated, missing, or waived with a reason.
- **Source of the value:** where it came from, for example "Lab report 2026-09".
- **In proposal:** untick to keep the value on the opportunity without printing it.

A row without a value is not printed.

Your own parameters

Add a parameter under a group writes a parameter for this opportunity alone: a name, a unit and a value. It prints after the defined ones, in the order written, and is marked "On this opportunity only". Ask the content admin when a parameter should become a standard one.

Saving

Save water data writes the whole section. The summary line says how many required values are still missing; the proposal's Water data and Treatment goal steps show the same.

Building a proposal

From the opportunity, **Start proposal** opens the builder: eight steps across the top, each marked when it still blocks the proposal, and a readiness gauge on the right. Work in any order; the proposal cannot be marked ready while a step is blocked.

The live preview

Show preview in the header keeps the document beside the steps, as the customer will get it. It renders again a moment after each saved change ("Changed, rendering shortly...", then "Up to date"); **Refresh** renders now, **Open in new tab** gives the current PDF. The browser remembers whether the pane is open. An issued version has no preview: its documents are on the Generate step.

The screenshot shows the QuoteFlow proposal builder interface. On the left is a dark blue sidebar with navigation links: WORK (My work, Opportunities, Proposals, Approvals, Reports), RECORDS, and Customers. The main area is titled 'Proposal' and shows the current step 'R1 - Waiting for commercial approval (current)'. A progress bar at the top indicates steps 1 through 8, with '6. Pricing' currently active. Below the progress bar, a 'Pricing' section displays a table of items with columns for Line, Qty, List total, Discount %, and Net total. The table lists items like 'Emergency mobilisation - UF and RO train, dispatch within 24 hours', 'MOUF T40 - mobile ultrafiltration, 20 ft container', 'MORO T25 - mobile reverse osmosis, trailer', 'Commissioning and operator instruction on site', and 'Antiscalant, 25 kg can'. To the right of the pricing table is a 'Readiness' gauge showing 8/8 and a 'Ready to mark as ready' status. At the bottom right, there is a 'Up to date' preview section showing a thumbnail of the proposal document.

Line	Qty	List total	Discount %	Net total
Emergency mobilisation - UF and RO train, dispatch within 24 hours	1	€9,800.00	0.00%	€9,800.00
MOUF T40 - mobile ultrafiltration, 20 ft container	1	€55,800.00	0.00%	€55,800.00
MORO T25 - mobile reverse osmosis, trailer	1	€85,500.00	10.00%	€76,950.00
Commissioning and operator instruction on site	2	€2,800.00	0.00%	€2,800.00
Antiscalant, 25 kg can	12	€2,220.00	0.00%	€2,220.00

1. General, 2. Water data, 3. Treatment goal

The opportunity's data and the water data as they will print, with the readiness checks on them. Edit them on the opportunity's page.

4. Options

QuoteFlow
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WORK

My work

Opportunities

Proposals

Approvals

Reports

RECORDS

Customers

Proposal

Q Search or jump to... ⌕

🔔

🖨

Claire Tremblay

← Back to the opportunity

Northwind Beverages — Northwind Montréal plant Waiting for commercial approval

MWS_CAN_26_10_Northwind_Beverages-R1 ✓ All changes saved

Version R1 · Waiting for commercial approval (current)

You can view this proposal but not change it.

✓ 1. General

✓ 2. Water data

✓ 3. Treatment goal

4. Options

✓ 5. Texts

✓ 6. Pricing

✓ 7. Approval

✓ 8. Generate

Options

Each option is a complete offer with its own lines and total. Prices are list prices from the catalog on the pricing date.
This version is read-only.

Winter peak, 90 days

90 days

December to February.

Net total
€147,570.00

Lines

Kind	Description	Qty	Days	Unit price	Line total
Transport	Emergency mobilisation – UF and RO train, dispatch within 24 hours per lump sum	1	—	€9,800.00	€9,800.00
Rental equipment	MOUF T40 – mobile ultrafiltration, 20 ft container per unit	1	90	€55,800.00	€55,800.00
Rental equipment	MORO T25 – mobile reverse osmosis, trailer per unit	1	90	€85,500.00	€85,500.00
Service	Commissioning and operator instruction on site per days	2	—	€1,400.00	€2,800.00
Consumable	Antiscalant, 25 kg can per cans	12	—	€185.00	€2,220.00
Optional	Operator on site per days	10	—	€980.00	€9,800.00
Option list total					€156,120.00
Optional extras					€9,800.00
Not included in the option total.					

Readiness

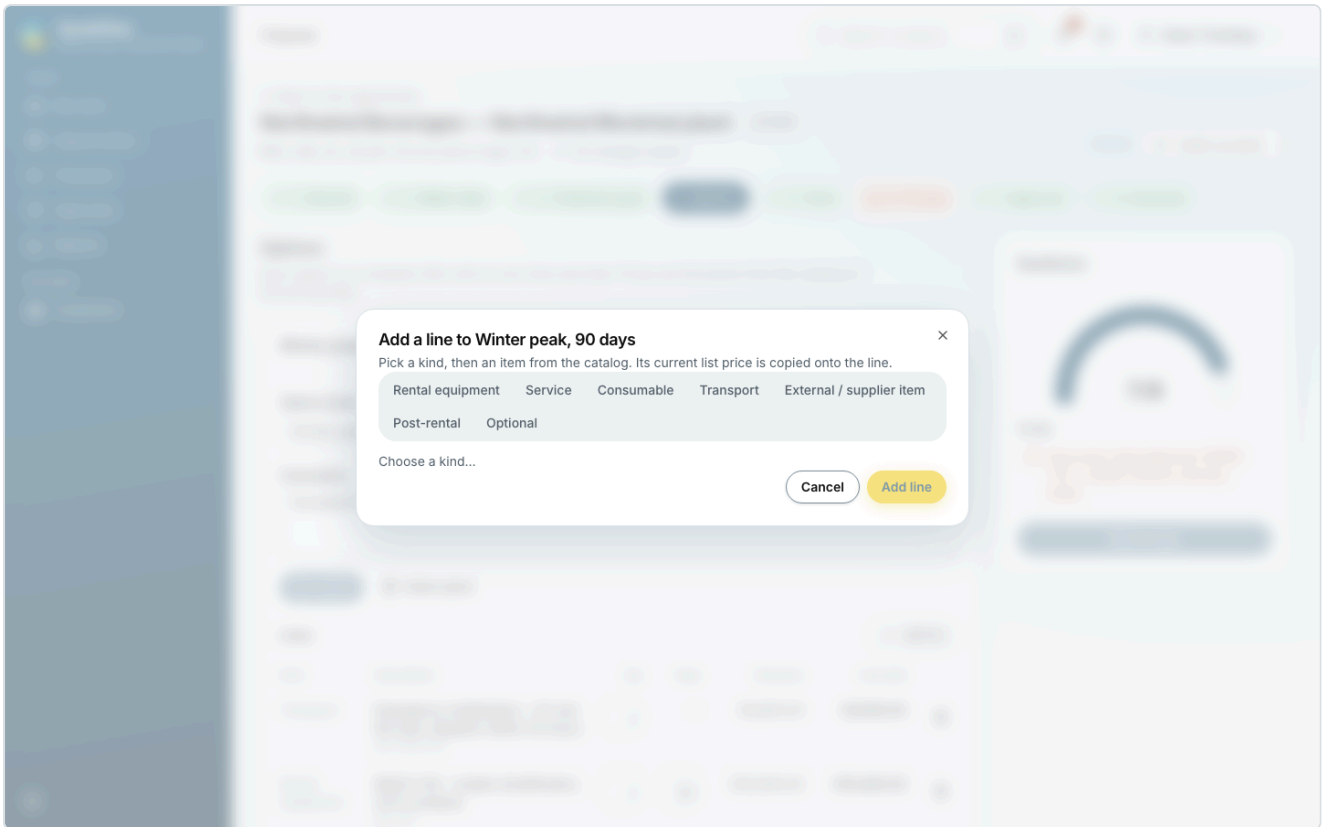
8/8

✓ Ready to mark as ready

One or more options the customer chooses between ("Rental of 1 × IPF10", "Emergency supply for 21 days"), each with a rental duration and comments. Lines inside an option:

- **Rental equipment** from the catalogue: price per day × the duration.
- **Service** and **consumable** items, **transport**, **external** supplier items, **post-rental** work.
- **Optional** lines, printed as extras outside the option's total.

Add line picks the kind, then the catalogue item and the quantity:



A line from the catalogue takes its description, unit and price from there; a custom line is written by hand and always needs commercial approval.

5. Texts

QuoteFlow

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WORK

My work

Opportunities

Proposals

Approvals

Reports

RECORDS

Customers

Proposal

Search or jump to...

1

Claire Tremblay

← Back to the opportunity

Northwind Beverages — Northwind Montréal plant

Waiting for commercial approval

MWS_CAN_26_10_Northwind_Beverages-R1 ✓ All changes saved

Version R1 · Waiting for commercial approval (current)

You can view this proposal but not change it.

✓ 1. General

✓ 2. Water data

✓ 3. Treatment goal

✓ 4. Options

5. Texts

✓ 6. Pricing

✓ 7. Approval

✓ 8. Generate

Customer texts

Document title

Document subtitle

What the cover calls the document, for example "Budget Indication". Empty prints "Proposal".

The line under it, for example the unit types.

Cover message

Dear Ms. Marchand,

Needed before the proposal is ready.

Project understanding

Northwind Beverages bottles soft drinks in Montréal and needs 15 m³/h of softened, low-conductivity process water during its winter peak, when the plant's own softener runs at its limit.

Process description

Readiness

8/8

✓ Ready to mark as ready

The cover message, the project understanding, the process description, assumptions and exclusions. The template decides which are required; the others print when filled.

6. Pricing

QuoteFlow

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WORK

My work

Opportunities

Proposals

Approvals

Reports

RECORDS

Customers

Proposal

Search or jump to...

🔔

🗨

Claire Tremblay

← Back to the opportunity

Northwind Beverages — Northwind Montréal plant

⚠️ Waiting for commercial approval

MWS_CAN_26_10_Northwind_Beverages-R1

✓ All changes saved

Version

R1 · Waiting for commercial approval (current)

You can view this proposal but not change it.

✓ 1. General

✓ 2. Water data

✓ 3. Treatment goal

✓ 4. Options

✓ 5. Texts

6. Pricing

✓ 7. Approval

✓ 8. Generate

Pricing

Enter a discount per line. Discounts above your authority need approval before the proposal can be marked ready.

Winter peak, 90 days

Line	Qty	List total	Discount %	Net total
Emergency mobilisation – UF and RO train, dispatch within 24 hours	1	€9,800.00	0.00%	€9,800.00
No discount				
MOUF T40 – mobile ultrafiltration, 20 ft container	1	€55,800.00	0.00%	€55,800.00
No discount				
MORO T25 – mobile reverse osmosis, trailer	1	€85,500.00	10.00%	€76,950.00
⚠️ Waiting for approval				
Commissioning and operator instruction on site	2	€2,800.00	0.00%	€2,800.00
No discount				
Antiscalant, 25 kg can	12	€2,220.00	0.00%	€2,220.00
No discount				
Operator on site Optional	10	€9,800.00	0.00%	€9,800.00
No discount				
List total		€156,120.00	Total discount 5.48%	Net total €147,570.00
			Optional extras	€9,800.00
			Not included in the option total.	

Readiness

8/8

✓ Ready to mark as ready

Every line with its list price, the discount you ask for, and what the pricing rules allow your role. A discount above your authority marks the line "needs approval" and blocks the proposal until it is decided.

7. Approval

QuoteFlow

Nijhuis Saur Industries Mobi...

WORK

My work

Opportunities

Proposals

Approvals

Reports

RECORDS

Customers

Proposal

Search or jump to...

⌕

🔔

🖨

Claire Tremblay

← Back to the opportunity

Northwind Beverages — Northwind Montréal plant

Draft

MWS_CAN_26_10_Northwind_Beverages-R1

✓ All changes saved

Version R1 · Draft (current)

✓ 1. General

✓ 2. Water data

✓ 3. Treatment goal

✓ 4. Options

✓ 5. Texts

⚠ 6. Pricing

7. Approval

✓ 8. Generate

Approval

Request approval

1 line needs approval. The proposal becomes read-only until every discount is decided.

Read the proposal as the customer will get it before you send it for approval.

📄 Preview PDF

Comment

Why these discounts? Up to 2000 characters.

Request approval

Readiness

7/8

To fix

⚠ Discounts need approval: MORO T25 – mobile reverse osmosis, trailer.

Mark ready

Approval request

Status

⌚ Withdrawn

Requested by

Claire Tremblay

Requested on

10/3/2026

Comment

Three months in the winter peak; 10 % on the RO rental keeps us ahead of the local rental company.

Line	Option	Requested	Status	Approver
MORO T25 – mobile reverse osmosis, trailer	Winter peak, 90 days	10.00%	⌚ Withdrawn	

Preview PDF shows the proposal as the customer will get it, before anything is sent. **Request approval** sends the lines that need a decision to the commercial admins with your comment; the proposal is read-only until every line is decided.

QuoteFlow

Nijhuis Saur Industries Mobi...

WORK

My work

Opportunities

Proposals

Approvals

Reports

RECORDS

Customers

Proposal

Search or jump to...

1

Claire Tremblay

← Back to the opportunity

Northwind Beverages — Northwind Montréal plant

Waiting for commercial approval

MWS_CAN_26_10_Northwind_Beverages-R1 ✓ All changes saved

Version R1 · Waiting for commercial approval (current)

You can view this proposal but not change it.

✓ 1. General

✓ 2. Water data

✓ 3. Treatment goal

✓ 4. Options

✓ 5. Texts

✓ 6. Pricing

7. Approval

✓ 8. Generate

Approval

Waiting for approval — the proposal is read-only until every discount is decided.

Approval request

Withdraw request

Status

Waiting for decisions

Requested by

Claire Tremblay

Requested on

10/3/2026

Comment

Three months in the winter peak; 10 % on the RO rental keeps us ahead of the local rental company.

Line	Option	Requested	Status	Approver
MORO T25 – mobile reverse osmosis, trailer	Winter peak, 90 days	10.00%	Waiting for a decision	

Readiness

8/8

✓ Ready to mark as ready

Withdraw request takes it back. The decision (approved, approved at a lower discount, rejected) shows here and as a notice.

8. Generate

QuoteFlow

Nijhuis Saur Industries Mobi...

WORK

My work

Opportunities

Proposals

Approvals

Reports

RECORDS

Customers

Proposal

Search or jump to...

1

Claire Tremblay

← Back to the opportunity

Northwind Beverages — Northwind Montréal plant

Waiting for commercial approval

MWS_CAN_26_10_Northwind_Beverages-R1 ✓ All changes saved

Version R1 · Waiting for commercial approval (current)

You can view this proposal but not change it.

✓ 1. General

✓ 2. Water data

✓ 3. Treatment goal

✓ 4. Options

✓ 5. Texts

✓ 6. Pricing

✓ 7. Approval

8. Generate

Generate

Template

Proposal, version 1

Optional parts

The template lets you leave these out of this proposal. Everything else is fixed.

✓ Equipment description

✓ Project plan

✓ Assumptions

✓ Exclusions

Preview

A draft PDF of the proposal as it stands. It is not stored.

Preview PDF

Issue

Readiness

8/8

✓ Ready to mark as ready

Pick the **template** (the company's proposal, or a shorter one), switch off the optional blocks the template allows, **Preview PDF** again, then **Mark ready** and **Issue proposal**. Issuing renders the Word and PDF files, appends the datasheets of the rented equipment, stores both in the opportunity's 02 Proposals folder and freezes the version.

The screenshot shows the 'Proposal' page in the QuoteFlow system. The left sidebar contains navigation links for 'WORK' (My work, Opportunities, Proposals, Approvals, Reports) and 'RECORDS' (Customers). The main content area is titled 'Proposal' and shows the details for 'Maple Ridge Dairy Cooperative — Maple Ridge Guelph plant'. The status is 'Issued'. The version bar shows 'R2 · Issued 10/2/2026 (current)' with buttons for 'Compare' and 'New revision'. A message states 'Issued on 10/2/2026 by Claire Tremblay — this version is frozen.' Below this is a progress bar with steps 1 through 8, where step 8 'Generate' is the current step. The 'Generate' section includes a 'Template' dropdown set to 'Emergency response quote, version 2', a list of 'Optional parts' (Equipment, Datasheets, Assumptions, Exclusions) all checked, and 'Issued documents' (Word and PDF) with download buttons. A 'Readiness' box on the right indicates 'Issued — this version is frozen.'

Revisions and comparison

An issued proposal never changes. **New revision** copies it as R2, R3, ...; the earlier documents stay where they are. **Compare** on the version bar shows what changed between two versions: general data, water values, options, lines, prices, texts and approvals.

QuoteFlow

Nijhuis Saur Industries Mobi...

WORK

My work

Opportunities

Proposals

Approvals

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Customers

Compare versions

Search or jump to...

1

Claire Tremblay

← Back to proposal

Compare versions

MWS_CAN_26_10_Maple_Ridge_Dairy_Cooperative-R1 → MWS_CAN_26_10_Maple_Ridge_Dairy_Cooperative-R2

From

R1 · Issued

To

R2 · Issued

General

2 changes

Start date

Changed

7-Oct-2026 → 6 Oct 2026

End date

Changed

28-Oct-2026 → 27 Oct 2026

Lines

16 changes

Emergency supply for 21 days › Commissioning and operator instruction on site

Added

2 days · €2,800.00

Emergency supply for 21 days › Antiscalant, 25 kg can

Added

4 cans · €740.00

Emergency supply for 21 days › Cartridge filter set, 5 µm

Added

2 sets · €840.00

Emergency supply for 21 days › Operator on site

Added

5 days · €4,900.00

Emergency supply for 42 days › Commissioning and operator instruction on site

Added

2 days · €2,800.00

Emergency supply for 42 days › Antiscalant, 25 kg can

Added

8 cans · €1,480.00

Emergency supply for 42 days › Cartridge filter set, 5 µm

Added

4 sets · €1,680.00

Emergency supply for 42 days › Operator on site

Added

5 days · €4,900.00

Emergency supply for 21 days › Commissioning and operator instruction on site

Removed

2-day-€2,800.00

Emergency supply for 21 days › Antiscalant, 25 kg can

Removed

4-can-€740.00

Emergency supply for 21 days › Cartridge filter set, 5 µm

Removed

2-set-€840.00

Emergency supply for 21 days › Operator on site

Removed

5-day-€4,900.00

Emergency supply for 42 days › Commissioning and operator instruction on site

Removed

2-day-€2,800.00

Emergency supply for 42 days › Antiscalant, 25 kg can

Removed

8-can-€1,480.00

Emergency supply for 42 days › Cartridge filter set, 5 µm

Removed

4-set-€1,680.00

Emergency supply for 42 days › Operator on site

Removed

5-day-€4,900.00

Approvals

2 changes

Emergency supply for 21 days › MORO T25 – mobile reverse osmosis, trailer › Approval

Changed

Approved-max 8.00% → Approved · max 8.00% · carried forward

Emergency supply for 42 days › MORO T25 – mobile reverse osmosis, trailer › Approval

Changed

Approved-max 8.00% → Approved · max 8.00% · carried forward

Notices while a draft is open

- The catalogue price of one of your lines changed: the line is marked, and saving it takes the new price.
- Your template version was retired: pick another on the Generate step.
- New pricing rules make a line need approval: the Pricing step says so.

Approving discounts

Commercial admins and operations managers see **Approvals**: the requests waiting in their scope.

QuoteFlow

Nijhuis Saur Industries Mobi...

WORK

My work

Opportunities

Proposals

Approvals1

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Customers

Catalog

ADMIN

Pricing rules

Approvals

Commercial approvals for discounts above authority.

To decide

My requests

All

Reference	Customer — site	Requester	Created	Status	Progress
MWS_CAN_26_10_Northwind_Beverages-R1	Northwind Beverages — Northwind Montréal plant	Claire Tremblay	10/3/2026	Open	1 of 1 pending

QuoteFlow manual · page 28 of 44

One request

QuoteFlow
Nijhuis Saur Industries Mobi...

WORK

- My work
- Opportunities
- Proposals
- Approvals 1
- Reports

RECORDS

- Customers
- Catalog

ADMIN

- Pricing rules

Approval request

Search or jump to... ⌕

⬅ All approvals

Northwind Beverages — Northwind Montréal plant Open

MWS_CAN_26_10_Northwind_Beverages-R1
Requested by Claire Tremblay on 10/3/2026

Open proposal

Comment

Three months in the winter peak; 10 % on the RO rental keeps us ahead of the local rental company.

Lines Approve all I can

Winter peak, 90 days Pending

MORO T25 – mobile reverse osmosis, trailer

Option	List price	Requested discount	Owner's authority
Winter peak, 90 days	€85,500.00	10.00%	5.00%
Reason	Rule		
Discount above authority	Rule 1 (any line) allows SALES up to 5.00%.		

Decision: Discount

☐ ☒ **Approve** ☐ ☒ **Approve a lower discount** ☐ ☒ **Reject**

Note (optional)

Submit decision

The proposal, the requester's comment, and each line with its list price, the requested discount, the owner's own authority and the rule that applies. Decide each line:

- **Approve:** the line keeps the requested discount.
- **Approve a lower discount:** the line takes the figure you enter.
- **Reject:** the line goes back to the owner's authority.

Approve all I can decides every line within your own authority at once. A note is optional and travels to the requester. **Show preview** in the header shows the proposal document itself under the header, so the decision is taken with the document in view.

The requester is told, the proposal unlocks, and the decision stays on the proposal's Approval step. Reports keeps the figures per approver and outcome.

Catalogue

Catalog holds what proposals are built from. Content admins keep the technical content; commercial admins keep the prices.

Equipment

The screenshot shows the 'Equipment' catalog page in the QuoteFlow system. The left sidebar contains navigation links for WORK (My work, Opportunities, Proposals, Approvals, Reports), RECORDS (Customers, Catalog), and ADMIN (Pricing rules, Templates, Users, Document folders, Audit log, System, Organization). The main content area is titled 'Catalog > Equipment' and includes a search bar. Below the title, a description states: 'Equipment, services and supplier items, and the water parameters the sales forms ask for.' A tabbed interface shows 'Equipment' as the selected category, with other tabs for 'Technology families', 'Services & consumables', 'Supplier items', and 'Water parameters'. A note explains: 'Equipment types and their rental list prices. Content Admins edit the description; Commercial Admins set the prices.' A 'Technology family' dropdown is set to 'All families', and a '+ Add equipment' button is present. A table lists five equipment items with their respective rental prices per day, week, and month, and their status (Active).

Name	Technology family	Per day	Per week	Per month	Status	Actions
MODAF IPF05 – containerized system MODAF-IPF05	Dissolved Air Flotation (DAF)	€390.00	—	—	Active	Edit Prices
MODAF IPF10 – skid mounted system MODAF-IPF10	Dissolved Air Flotation (DAF)	€520.00	—	—	Active	Edit Prices
MODAF IPF30 – containerized system MODAF-IPF30	Dissolved Air Flotation (DAF)	€890.00	—	—	Active	Edit Prices
MORO T25 – mobile reverse osmosis, trailer MORO-T25	Reverse Osmosis (RO)	€950.00	—	—	Active	Edit Prices
MOUF T40 – mobile ultrafiltration, 20 ft container MOUF-T40	Ultrafiltration (UF)	€620.00	—	—	Active	Edit Prices

A type per rentable unit: code, name, family, description, specifications, a photo and a **datasheet** (a PDF appended to every proposal that rents it). The commercial admin sets its price per day.

Edit equipment type ×

What appears on datasheets and in proposals.

Technology family Code

Reverse Osmosis (RO) MORO-T25

Name

MORO T25 - mobile reverse osmosis, trailer

Description

Reverse osmosis unit in a 13.6 m trailer for the supply of demineralised process water. It is delivered with membranes installed and preserved, and produces water within hours of arrival. Conductivity, flow and pressure are monitored remotely.

Specifications

Permeate flow	up to 25 m³/h	×
Recovery	70 - 80 %, depending on the feed water	×
Salt rejection	> 98 %	×
Feed pressure required	2 - 6 bar	×
Connections	feed and permeate DN 80, concentrate	×

Cancel Save

Families, service items, external items

Families are the technologies (ultrafiltration, reverse osmosis, DAF, ...). **Service and consumable items** and **external items** have a unit and a list price; the unit prints beside the quantity ("2 days", "4 cans").

A price change reaches open drafts as a notice; issued proposals keep their prices.

Water parameters

 **QuoteFlow**
Nijhuis Saur Industries Mobi...

WORK

My work

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Catalog

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System

Organization

Catalog > Water parameters

Search or jump to...

4

Harry Sloan

Catalog

Equipment, services and supplier items, and the water parameters the sales forms ask for.

Technology families

Equipment

Services & consumables

Supplier items

Water parameters

The questions the sales water-data forms ask. Each parameter is asked for the applications ticked, or for all of them when none is ticked.

+ Add parameter

Inlet water

Label	Type	Range	Asked for	Required	Status	Actions
Flow flow_avg	Number	≥ 0 m ³ /h	All applications	Required	Active	Edit
Design flow flow_design	Number	≥ 0 m ³ /h	All applications	Optional	Active	Edit
TSS tss	Number	≥ 0 mg/L	Wastewater	Required	Active	Edit
BOD Total bod	Number	≥ 0 mg/L	Wastewater	Optional	Active	Edit
Peak flow flow_peak	Number	≥ 0 m ³ /h	All applications	Optional	Active	Edit
BOD Soluble bod_soluble	Number	≥ 0 mg/L	Wastewater	Optional	Active	Edit
Operating hours operating_hours	Number	0-24 h/day	All applications	Optional	Active	Edit
COD Total cod	Number	≥ 0 mg/L	Wastewater	Required	Active	Edit

The list asked on every opportunity: key, label, unit, group (inlet or treatment goal), type (number or text), the applications it applies to, whether it is required, and its allowed range. A parameter marked inactive is no longer asked but keeps its old values.

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Pricing rules

QuoteFlow
Nijhuis Saur Industries Mobi...

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- Pricing rules**
- Templates
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- Organization

Pricing rules

Search or jump to...

4

Harry Sloan

Pricing rules

Maximum discount each role may give without approval. Publishing creates a new version; past approvals keep the version they used.

☐ Show sales users their maximum discount before they request approval

Current rules

Edit a draft of the rules in effect. Rows are checked top to bottom; empty conditions match anything, and an empty role cell gives that role nothing.

#	Family	Intervention	Region	Country	Days	Deal size (EUR)	Min markup %	Sales %	Commercial admin %
1		Any	.	A			10	5	12
2		Multi	.	A				8	15
3		Any	.	A		500000.00		7	15
4		Any	.	A	180			8	18

+ Add row

Publish

Effective from

02.10.2026

Note

Why the rules change (up to 500 characters).

Change the draft to publ

A rule set has an effective date and rows. Each row sets, for an intervention type, a deal size or a duration, the maximum discount each role may give without approval and the minimum markup. The first matching row decides.

Publishing a new set tells the owners of drafts whose lines now need approval. **Disclose authority** lets salespeople see their own maximum discount before they ask.

Templates

QuoteFlow
Nijhuis Saur Industries Mobi...

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- My work
- Opportunities
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RECORDS

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ADMIN

- Pricing rules
- Templates**
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- Organization

Templates

Search or jump to... 🔍

Proposal templates

Build the documents NSI sends from blocks, preview them with sample data, then activate them. + New template

Templates

Each template is a document NSI sends, with its own versions. A salesperson picks one for a proposal; a new proposal starts with the default.

Proposal Default Open

Version 1 is active · 1 version

Emergency response quote Open

A short quote for an emergency call-out: the situation, the response, the price and the datasheets.
Version 2 is active · 2 versions

Looks

A look is a Word file that gives a built template its cover, headers, footers and fonts. The blocks go where its prototype paragraphs stand: {{look.heading1}}, and optionally heading2, heading3, subheading and text, each formatted as that element shall look.

NSI Mobile Water Solutions

nsi-look.docx · Oct 2, 2026, 4:39 PM Download

Name Word file (.docx)

Choose File No file chosen Upload look

Document locale

Language and number format in documents

English (United Kingdom)

Templates lists the proposal templates. Each has versions; one version is active and the proposals use it. A version is either built in the app, or an uploaded Word file with merge tags (the builder's field list names every field).

A template

The screenshot displays the 'Emergency response quote' template page in the QuoteFlow application. The left sidebar contains navigation menus for 'WORK' (My work, Opportunities, Proposals, Approvals, Reports), 'RECORDS' (Customers, Catalog), and 'ADMIN' (Pricing rules, Templates, Users, Document folders, Audit log, System, Organization). The main content area is titled 'Templates' and shows a search bar, user profile, and a list of templates. The selected template is 'Emergency response quote', described as 'A short quote for an emergency call-out: the situation, the response, the price and the datasheets.' It has buttons for 'Rename', 'Make default', and 'Archive'. Below this, the 'Versions' section shows two versions: 'Version 2' (Active) and 'Version 1' (Retired). Each version entry includes the filename 'emergency-response-quote.docx', a note 'Built in the app', the creator 'Harry Sloon', the timestamp, and the status 'No problems'. Version 2 has buttons for 'Open', 'Preview PDF', and 'Download .docx'. Version 1 has buttons for 'Open', 'Preview PDF', 'Download .docx', and 'Activate'. At the bottom, the 'Upload a Word version' section provides instructions for uploading a .docx file with placeholders for tags, a 'Choose File' button, and an 'Upload' button. A 'Note' text area is also present.

QuoteFlow
Nijhuis Saur Industries Mobi...

WORK

- My work
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Templates

Search or jump to... JK 4 Harry Sloon

← All templates

Emergency response quote

A short quote for an emergency call-out: the situation, the response, the price and the datasheets.

Rename Make default Archive

Versions

A draft copy of version 2 to edit in the builder. Nothing changes for proposals until you activate it.

+ New version

Version 2 · emergency-response-quote.docx Active

Built in the app

Harry Sloon, Oct 2, 2026, 10:00 PM No problems

Open Preview PDF Download .docx

Version 1 · emergency-response-quote.docx Retired

Built in the app

Harry Sloon, Oct 2, 2026, 9:53 PM No problems

Open Preview PDF Download .docx Activate

Upload a Word version

For full control in Word: a .docx with {{tags}} becomes a version of this template. Download a built version as Word to start from.

Word template (.docx) Note

Choose File No file chosen

Upload

New version copies the active one or starts from the shipped starter; a new version is edited until it is activated, then it never changes. **Retire** a version to stop its use; the owners of drafts that use it are told.

The builder

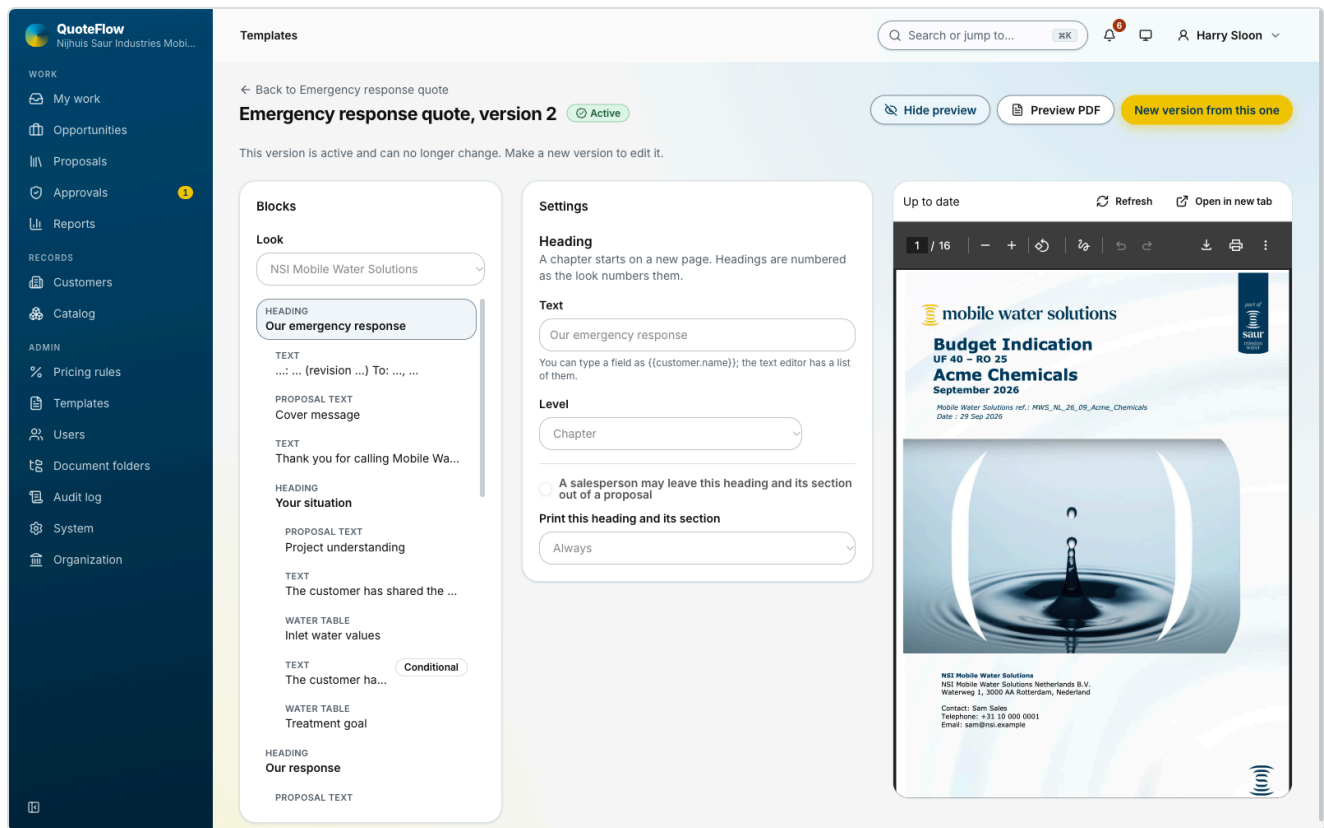
The screenshot shows the 'The builder' interface in QuoteFlow. On the left is a dark blue sidebar with a 'QuoteFlow' logo and a list of navigation items: WORK (My work, Opportunities, Proposals, Approvals, Reports), RECORDS (Customers, Catalog), and ADMIN (Pricing rules, Templates, Users, Document folders, Audit log, System, Organization). The main area is titled 'Templates' and shows a search bar, a user profile 'Harry Sloon', and a back button. The current template is 'Emergency response quote, version 2', which is marked as 'Active'. There are buttons for 'Preview PDF' and 'New version from this one'. Below the title, a message states: 'This version is active and can no longer change. Make a new version to edit it.' The interface is divided into two main panels: 'Blocks' and 'Settings'. The 'Blocks' panel on the left lists various components: 'Look' (set to 'NSI Mobile Water Solutions'), 'HEADING' (set to 'Our emergency response'), 'TEXT' (revision fields), 'PROPOSAL TEXT' (Cover message), 'TEXT' (Thank you for calling Mobile Water So...), 'HEADING' (Your situation), 'PROPOSAL TEXT' (Project understanding), 'TEXT' (The customer has shared the follow...), 'WATER TABLE' (Inlet water values), 'TEXT' (The customer has nam...), and 'WATER TABLE' (Treatment goal). The 'Settings' panel on the right allows configuration for the selected 'Our emergency response' heading. It includes a 'Heading' section with a description, a 'Text' field with a placeholder 'Our emergency response', a 'Level' dropdown set to 'Chapter', and a checkbox for 'A salesperson may leave this heading and its section out of a proposal'. The 'Print this heading and its section' dropdown is set to 'Always'.

A built version is a sequence of blocks laid on a **look**, a Word file that gives the cover, contents, headers, footers and paragraph styles:

- headings and rich text with merge fields;
- the water tables (inlet, with or without the Maximum column; treatment goal);
- the equipment descriptions, the rental periods, the price tables, the optional extras;
- a picture from the picture library, with a caption;
- the list of datasheets.

A block can be optional, so a salesperson may switch it off on one proposal, or shown only when its data exists. The builder saves as you type, lists problems, and previews with sample data. **Activate** freezes the version.

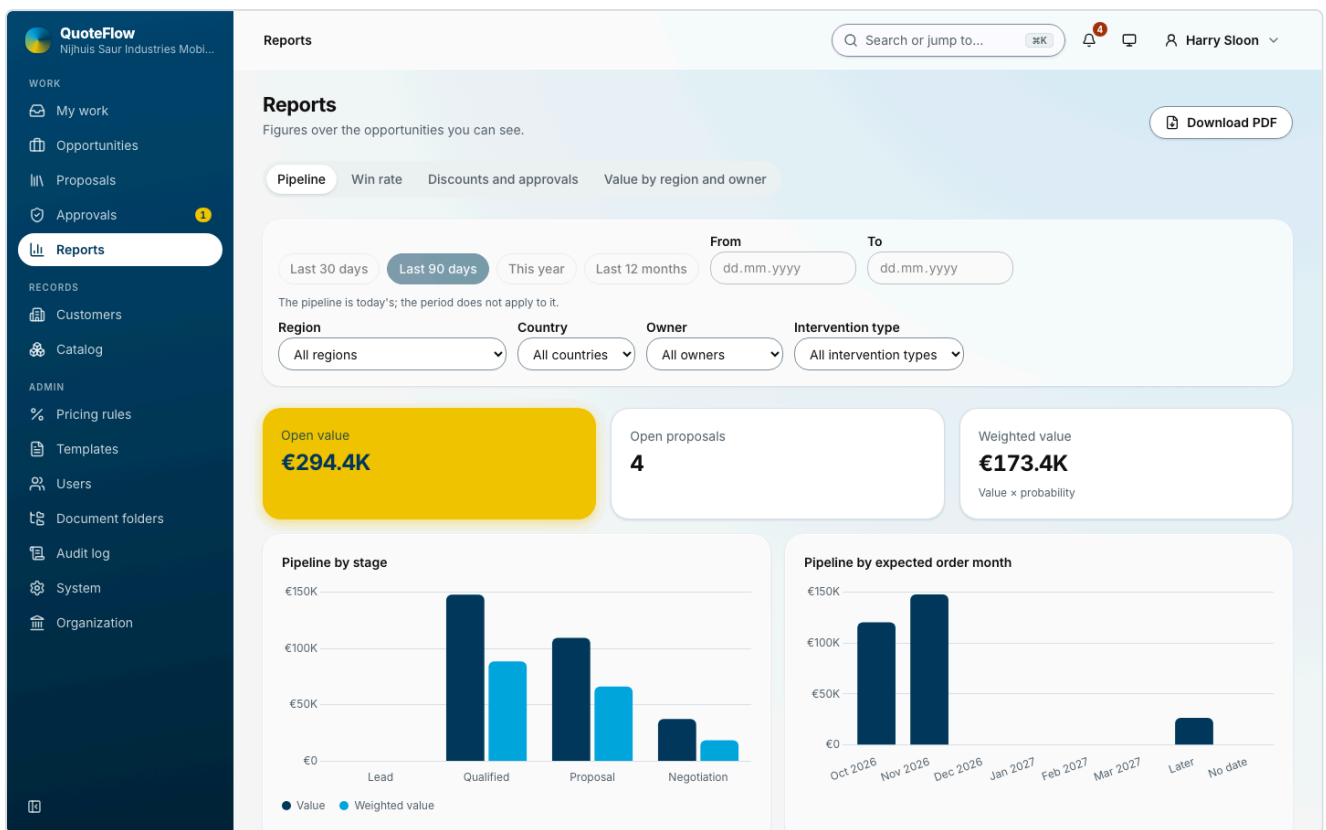
Show preview keeps the rendered template beside the blocks, filled with the sample proposal, and renders it again after each save; so a change to a heading or a table shows within seconds.



Document language

The **Organization** page sets the document language, which formats dates and numbers in every document.

Reports



Over the opportunities you can see: the pipeline by stage with weighted value, win rate and lost reasons, approvals per approver and outcome, activity over time. Filter by region, country, owner and period. Each report prints as a PDF.

Administration

For super admins.

Organization

QuoteFlow
Nijhuis Saur Industries Mobi...

WORK

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Organization

Search or jump to... 🔍

🔔 🗨 👤 Harry Sloon

Organization

Company, document language, regions and countries.

Company

Company name *

Nijhuis Saur Industries Mobile Water Solutions

Legal name

NSI Mobile Water Solutions Germany GmbH

The contracting entity documents name, when it differs from the company name.

Address

Vitsstraße 4, 52525 Heinsberg, Deutschland

On one line, as documents print it.

Currency

EUR

Units

Metric

Locked once proposals exist

Reference pattern

MWS_{COUNTRY}_{YY}_{MM}_{CUSTOMER}

Tokens: {YYYY}, {YY}, {MM}, {REGION}, {COUNTRY}, {CUSTOMER} and at most one {SEQ:n} (n from 3 to 8). Without a sequence, a reference that is taken gets _2, _3 and so on.

Proposal validity (days)

29

An issued proposal is valid this long. Proposals already issued keep their date.

Expiry warning (days)

7

This long before its validity ends, a proposal counts as expiring: its owner is notified and My Work lists it.

Stale draft (days)

14

My Work lists a draft that has not changed for this long.

Keep notifications (days)

90

Older notifications are deleted.

Keep the audit trail (days)

Forever

Leave empty to keep it forever. Otherwise at least a year: older events are deleted each day.

Document language

English (United Kingdom)

Save

Regions and countries

+ Add region

	Code	Name	Status	Actions
>	EMEA	Europe, Middle East and Africa	🟢 Active	...
>	AMER	Americas	🟢 Active	...

Company name, legal name and address (printed on proposals), currency (locked once proposals exist), units, the reference pattern, proposal validity, the expiry warning and stale draft thresholds, how long notifications and the audit trail are kept, the document language, and the regions and countries with their

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codes in references.

Users

The screenshot shows the 'Users' management page in the QuoteFlow application. The left sidebar contains navigation links for WORK, RECORDS, and ADMIN. The main content area displays a list of users with columns for Name, Status, Roles, Last sign-in, and Actions. The 'Users' section title is followed by the instruction 'Invite people, set their roles and control who can sign in.' and two buttons: 'Download access review' and 'Invite user'.

Name	Status	Roles	Last sign-in	Actions
Claire Tremblay claire.tremblay@waterrentalcompany.com	Active	Sales · AMER	10/3/2026	Edit roles Deactivate
Harry Sloon harry.sloon@waterrentalcompany.com	Active	Commercial admin Content admin Sales Super admin	10/3/2026	Edit roles
Jonas Weber jonas.weber@waterrentalcompany.com	Active	Sales · DE	10/3/2026	Edit roles Deactivate
Maria Santos maria.santos@waterrentalcompany.com	Active	Commercial admin	10/3/2026	Edit roles Deactivate

Invite a user with roles and scopes, change roles, deactivate (an owner with open opportunities is handed over first), reissue an invitation link.

Document folders

QuoteFlow
Nijhuis Saur Industries Mobi...

WORK

My work

Opportunities

Proposals

Approvals

Reports

RECORDS

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Document folders

Search or jump to...

4

Harry Sloon

Document folders

Where each new opportunity's folder is created, and the subfolders inside it.

Folder pattern

{year}/{region}/{intervention}/{ref} {customer}

Example: 2026 / EMEA / Emergency / QF-2026-EMEA-0001 Acme Water

Use {year}, {region}, {intervention}, {ref} and {customer}; separate folder levels with /.

Subfolders

01 Customer Input

02 Proposals

03 Contract

04 Technical

05 Handover

06 Communications

+ Add subfolder

Changes apply to opportunities created from now on.

Save

The folder names every opportunity gets, and the upload rules.

Audit log

QuoteFlow

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Harry Sloon

Audit log

Every recorded action, newest first. Filters stay in the address, so you can share them.

Actor

Anyone

Action

e.g. proposal. matches every prop

Object type

Object ID

From

dd.mm.yyyy, --:--

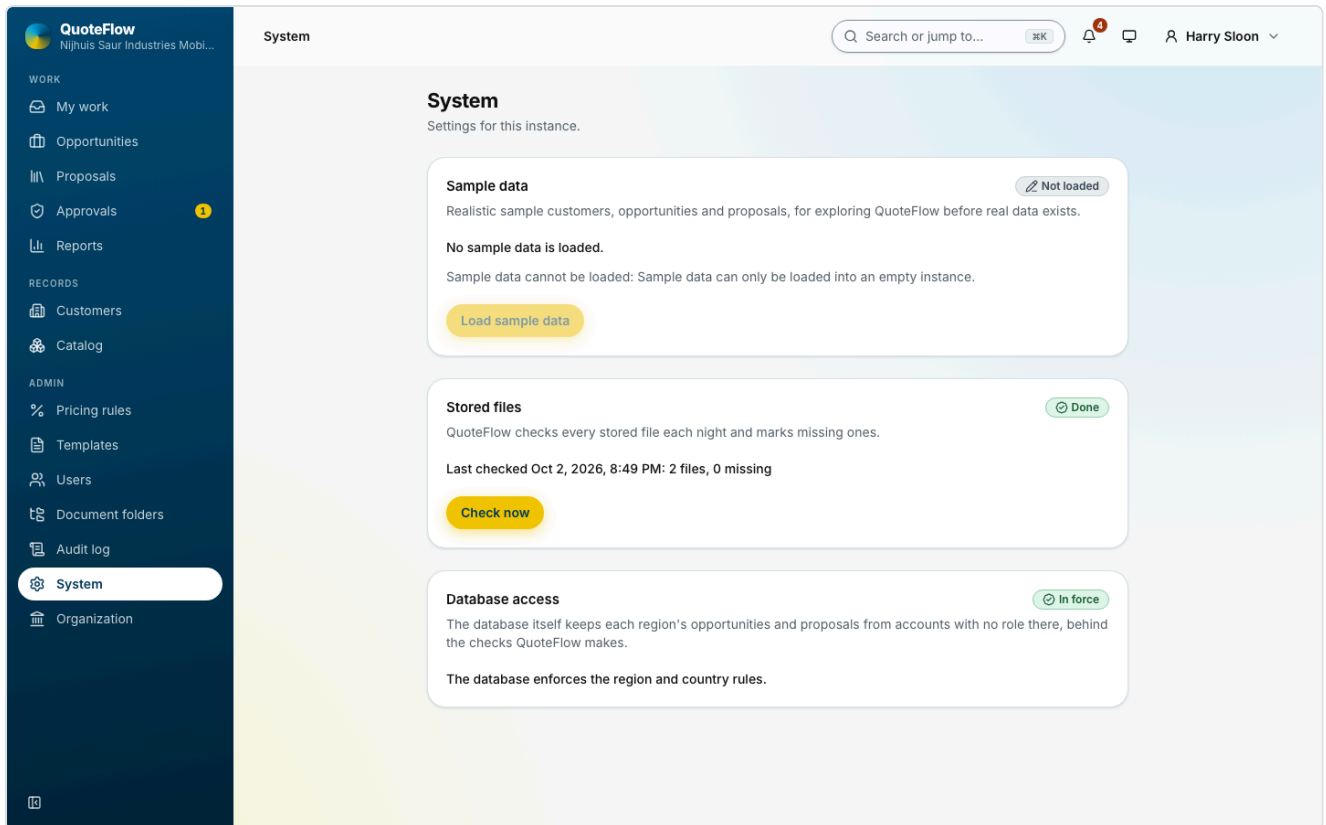
To

dd.mm.yyyy, --:--

Time	Actor	Action	Object	Detail
Oct 3, 2026, 1:10 AM	Harry Sloon	Signed in	User ac4a42a7	Show details
Oct 3, 2026, 1:09 AM	Maria Santos	Signed in	User cc230871	Show details
Oct 3, 2026, 1:09 AM	Claire Tremblay	Signed in	User 81413c1e	Show details
Oct 3, 2026, 1:08 AM	Harry Sloon	Signed in	User ac4a42a7	Show details
Oct 3, 2026, 1:08 AM	Claire Tremblay	Signed in	User 81413c1e	Show details
Oct 3, 2026, 1:07 AM	Harry Sloon	Signed in	User ac4a42a7	Show details
Oct 3, 2026, 1:06 AM	Harry Sloon	Signed in	User ac4a42a7	Show details
Oct 3, 2026, 1:06 AM	Claire Tremblay	Approval requested	Approval request 86b366ba	Show details
Oct 3, 2026, 1:06 AM	Claire Tremblay	Line updated	Proposal version 01b6dee0	Show details

Every change with who, when, from where and what; filters by action, actor and period; export.

System



- **Sample data:** load a fictional company to look around, only into an empty instance; remove it again.
- **Stored files:** the nightly check lists documents whose file is gone; run it now.
- **Database access:** whether the database enforces the region and country rules behind the application ("In force").

Everyday answers

1. *I cannot see an opportunity a colleague mentions.*

You hold no role in its region or country. A super admin adds one.

2. *Mark ready is disabled.*

A step still blocks: the mark on the step and the readiness panel say which. Lines needing approval block until they are decided.

3. *The preview or the issue says the PDF service is unavailable.*

The service was asleep; try again in a minute, or press **Refresh** on the preview pane. An issue that fails retries by itself.

4. *The preview pane stays grey.*

The browser has no PDF viewer of its own (some mobile browsers). **Open in new tab** shows the document there.

5. *A download says the file is missing.*

The stored file was removed outside the app; the System page's check lists all such files. Issue a new revision to get fresh documents.

6. *The customer's analysis has a parameter we never defined.*

Add it under the group on the water data section; it is kept for this opportunity only. Ask the content admin if it should become a standard parameter.

7. *We do not want a value printed.*

Untick "In proposal" on its row.

8. *A proposal was issued with a mistake.*

Issued versions never change: make a revision, fix it, issue R2.

9. *The customer gave only a maximum.*

Leave the value empty and fill the maximum; the document prints a dash for the average.

10. *Who sees my activities?*

Anyone who can see the opportunity and edit customers; only you edit or delete yours.