

Approve & Decline Job Request Quote Setup

Introduction

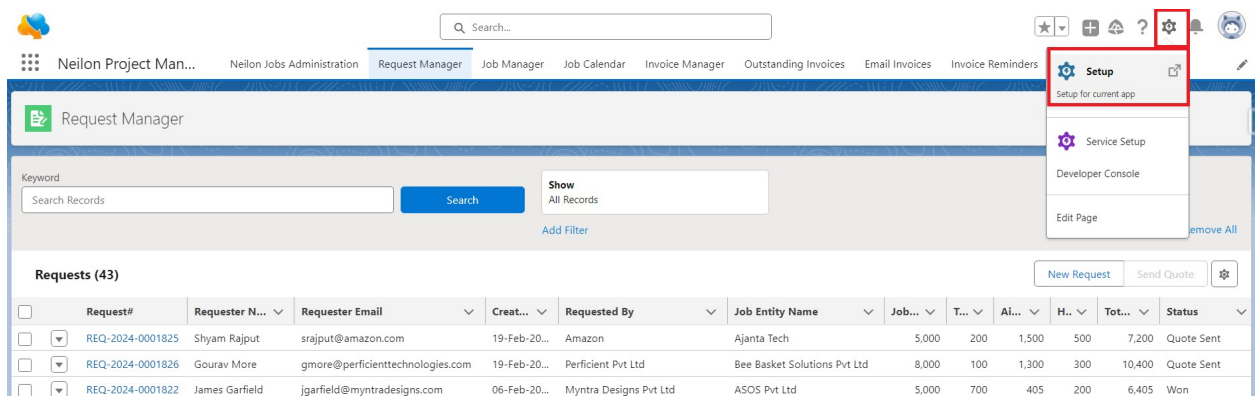
A customer or job requester can approve or decline job requests after receiving a quotation. In the quotation notification email, they will get links to approve and decline the job requests. By clicking on those links they can approve or decline job requests.

Here are the steps to set up the approve and decline links.

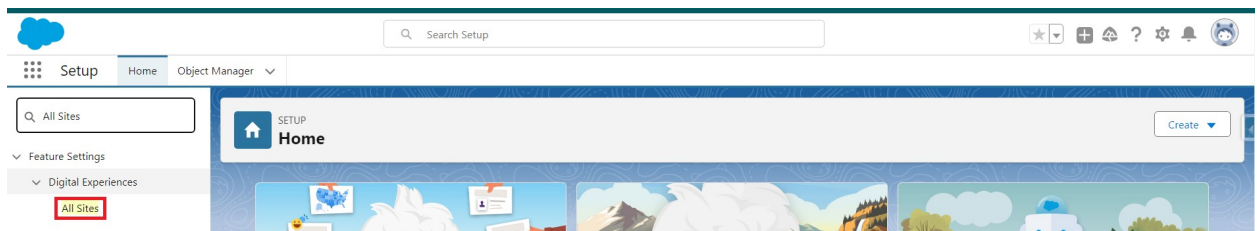
Functionality Overview

Follow the below steps to set up approve and decline job request quote links.

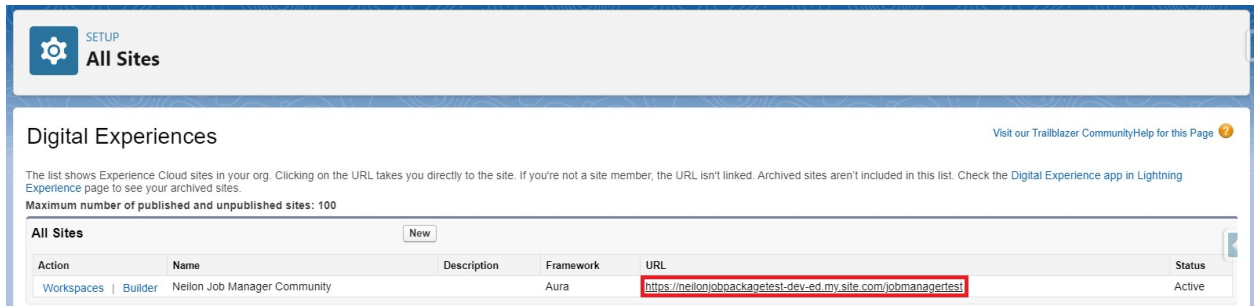
1. Navigate to the **Neilon Project Management** application from the App Launcher.
2. Click on **Setup**.



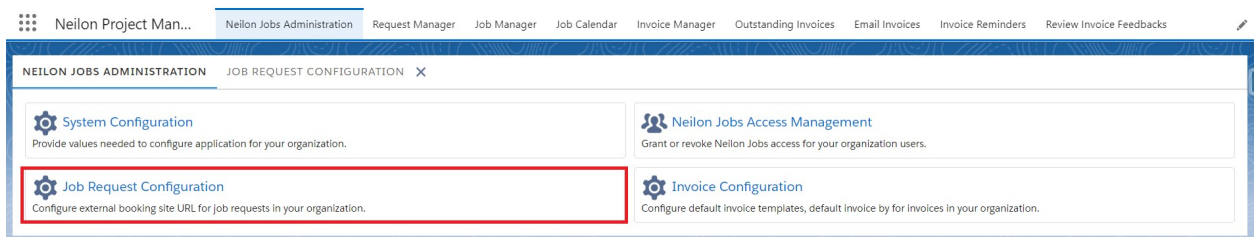
3. Search **All Sites** in **Quick Find**.



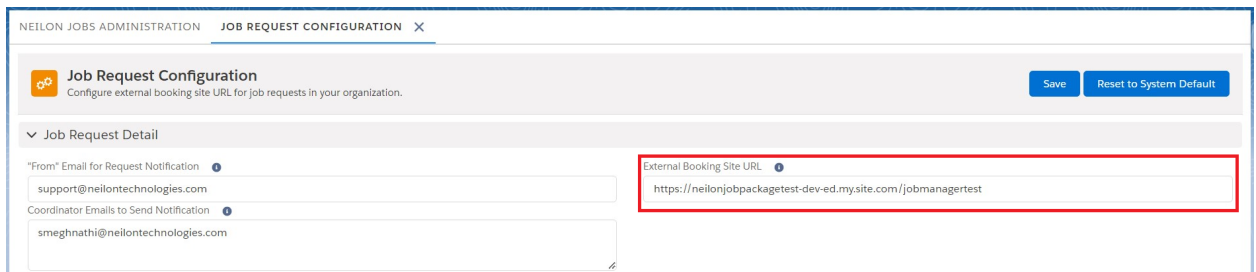
4. If there is no site configured in **All Sites**, then configure a new site by following the **Neilon Project Management Public Site Setup** guide.
5. If the site is already configured, then copy that site's URL.



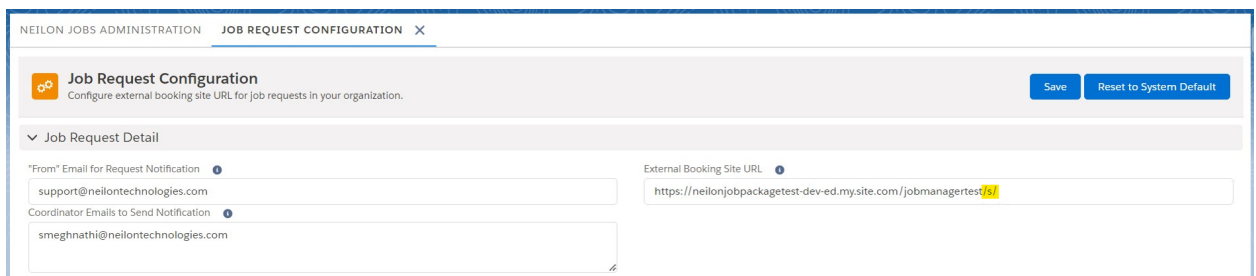
6. Navigate to the **Neilon Project Management** application from the App Launcher.
7. Go to the **Neilon Jobs Administration** tab. Click on **Job Request Configuration**.



8. Paste the copied site URL in the **External Booking Site URL**.



9. After pasting the site URL in the field add **/s/** at its end. Click on the **Save** button.



Setup of approve job request quote link

Follow the below steps to set up approve job request quote links.

1. Go to **All Sites** again. Click on **Builder** for the site which URL we have used in the **External Booking Site URL**.

SETUP All Sites

Digital Experiences

Visit our Trailblazer CommunityHelp for this Page

The list shows Experience Cloud sites in your org. Clicking on the URL takes you directly to the site. If you're not a site member, the URL isn't linked. Archived sites aren't included in this list. Check the [Digital Experience app in Lightning Experience](#) page to see your archived sites.

Maximum number of published and unpublished sites: 100

All Sites New

Action	Name	Description	Framework	URL	Status
Workspaces	Builder	Neilon Job Manager Community	Aura	https://neilonjobpackage-test-dev-ed.my.site.com/jobmanagertest	Active

2. It will open the digital experience.
3. Click on the gear icon here to open **Page Properties**.

Home Page Properties Preview Publish

Template Header Top

Home Job Request Manager

Search...

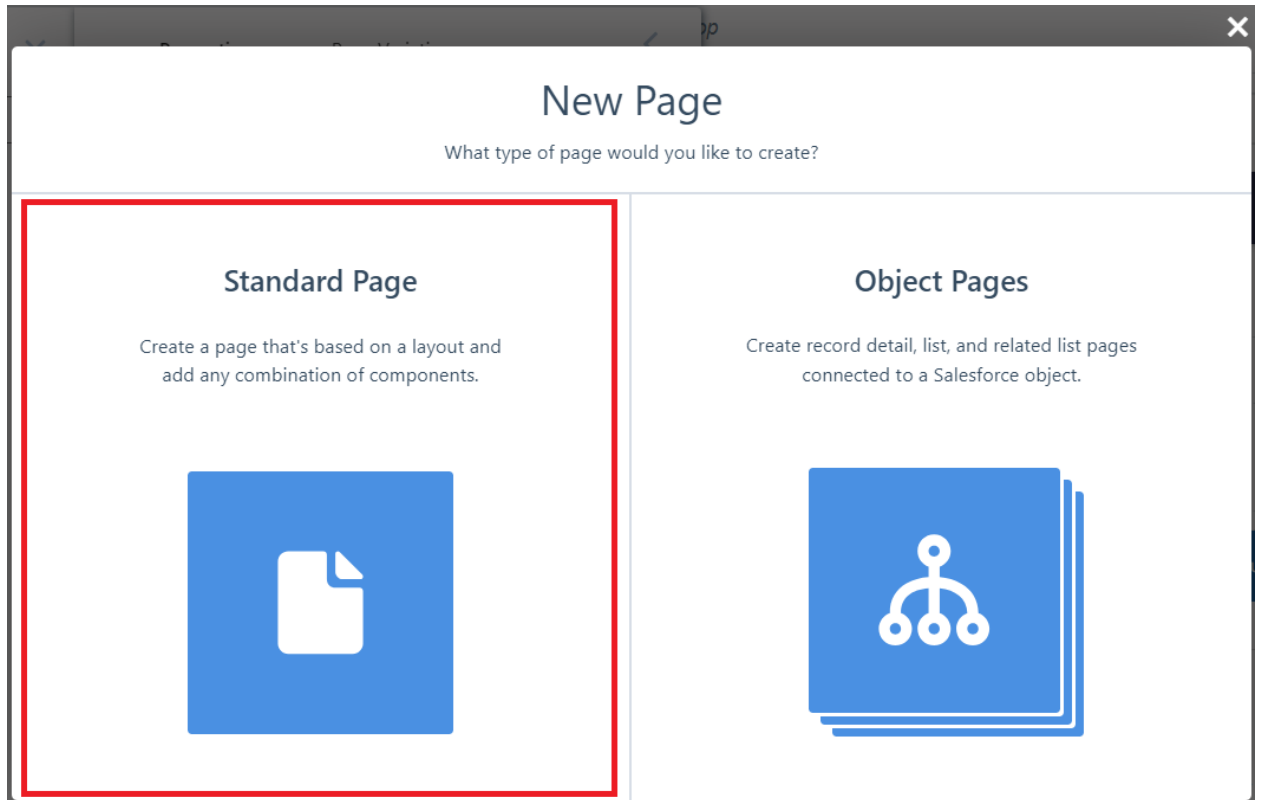
User16995990657346936001

Template Header Bottom

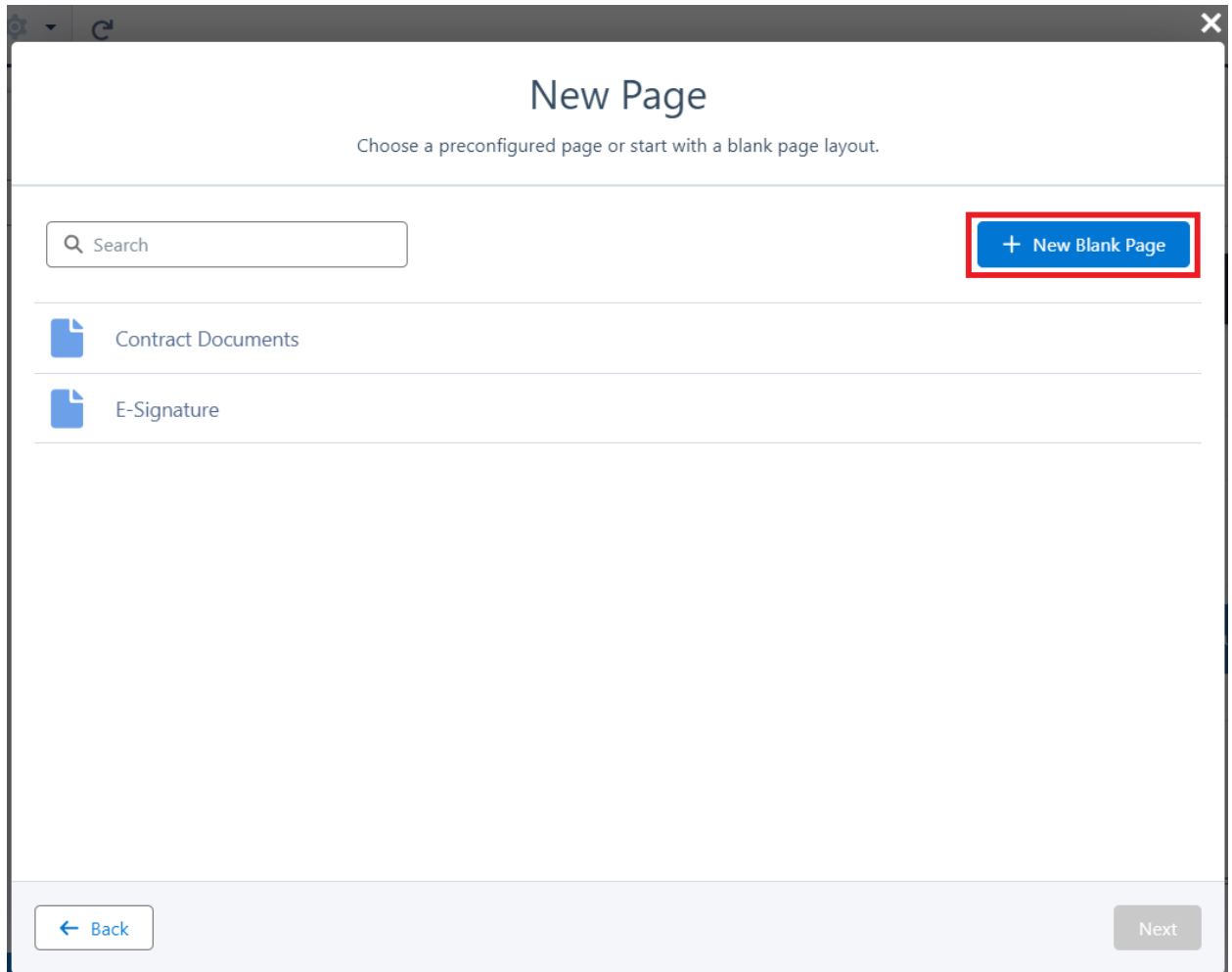
4. Click on **New Page**.

The screenshot displays a web application interface with a sidebar on the left and a main content area on the right. The sidebar contains a 'Pages' list with various items, including 'Home', 'Account Management', 'Action Plan', 'Action Plan Template', 'Campaign', 'Case', 'Contact Support', 'Create Record', 'Dashboard', 'Error', 'Feed Detail', and 'File'. A red rectangle highlights the '+ New Page' button at the bottom of the 'Pages' list. The main content area shows the 'Page Properties' dialog box, which is open for the 'Home' page. The dialog has two tabs: 'Properties' and 'Page Variations'. The 'Properties' tab is active, showing fields for Name, URL, API Name, Page Access, Title, and Description. The 'Name' field is set to 'Home', the 'URL' field is set to '/', the 'API Name' field is set to 'Home', the 'Page Access' field is set to 'Site Default Setting: Public', the 'Title' field is set to 'Home', and the 'Description' field is empty. The 'Description' field has a placeholder text: 'Page description that can appear in search engine results.'

5. Select **Standard Page**.



6. Click on the **New Blank Page**.



7. Select **1 full-width column** page layout and click on **Next**.

New Page

Choose a content layout that defines the regions of your page.

Introducing Flexible Layouts New

Gives you the most control over your page and its layout

Build your own layout by adding full-width sections across your page. Create up to six columns within each section, then resize them for the ultimate flexible design. Add sections to build out the page and stack them as you wish.

Current Layouts

- 1 full-width column** (highlighted with a red border)
- 2 columns, 1:2 ratio
- 2 columns, 1:1 ratio
- 2 columns, 2:1 ratio

[← Back](#) [Next](#) (highlighted with a red border)

8. Configure values as per the data shown in the table.

Property	Property Value
Name	Approve Quote
URL	approve-quote
API Name	Approve_Quote

New Page

Give your page a name and a URL.

* Name

Approve Quote

* URL

/ approve-quote

API Name ⓘ

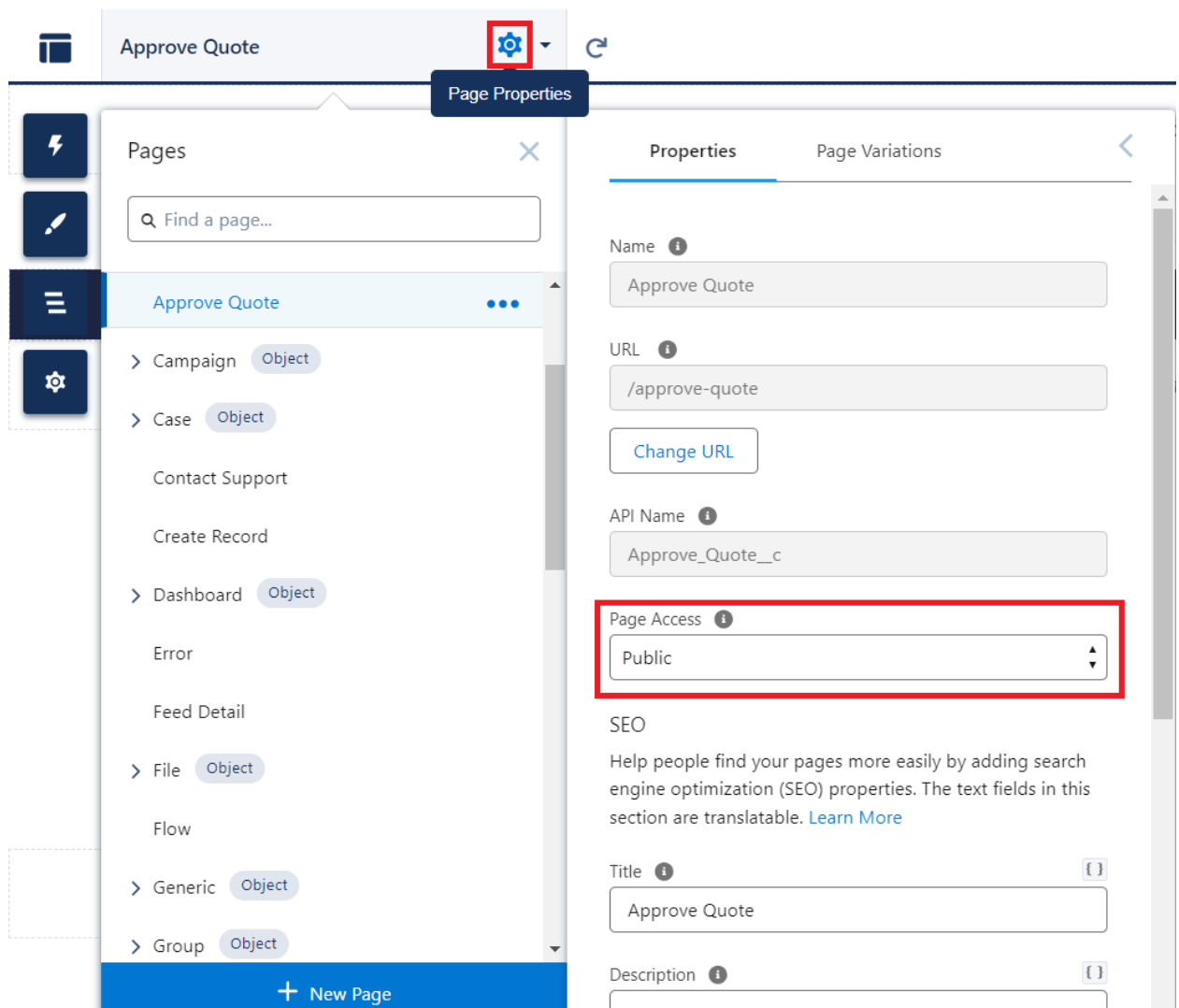
Approve_Quote

← Back

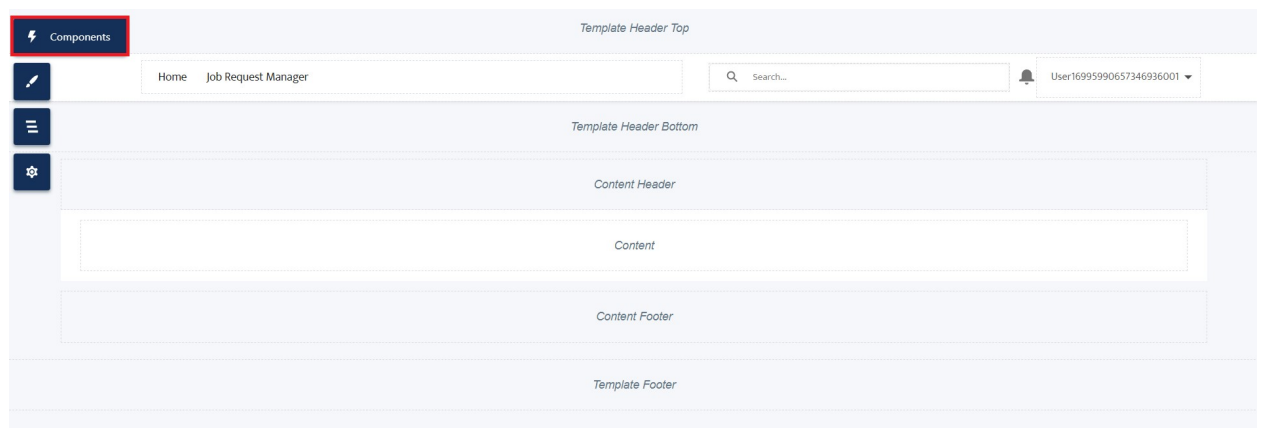
Create

9. Click on **Create**. The page will be created.

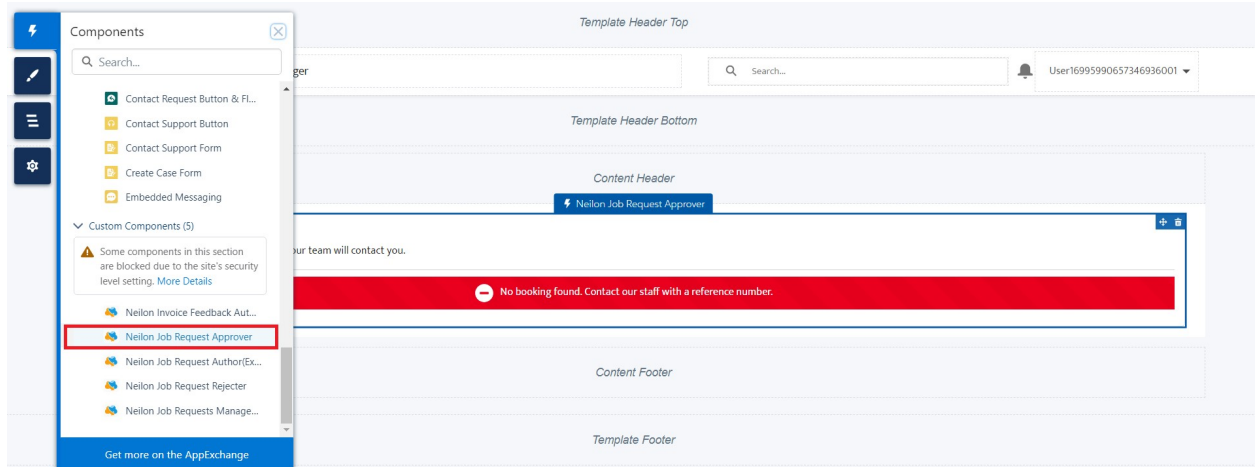
10. Click on the top left-side gear icon of the **Page Properties** and set **Page Access** as **Public**.



11. After that, click on the **Components** button.



12. Drag and drop **Neilon Job Request Approver** to the **Content** section.

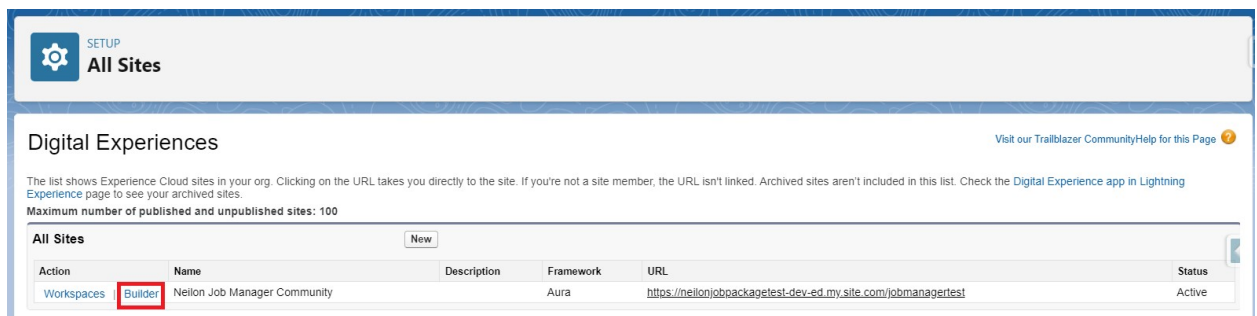


13. Click on the **Publish** button at the top-right corner to publish the page. It will show a site publish confirmation popup. Click on the **Publish** button.
14. You will get a confirmation email once the site is published successfully and live.

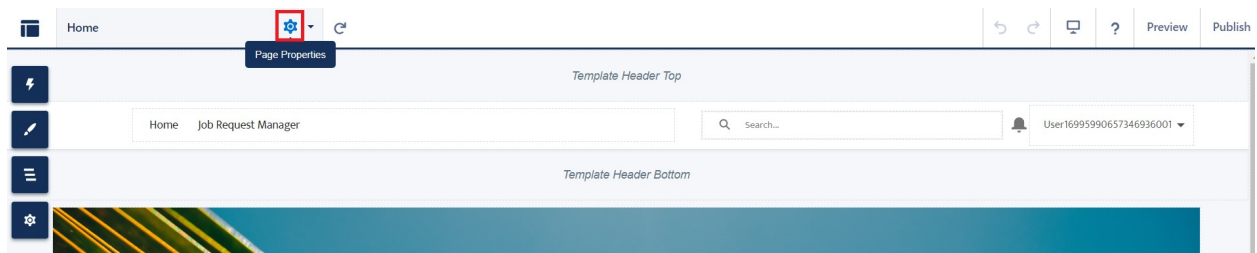
Setup for decline job request quote link

Follow the below steps to set up decline job request quote links.

1. Go to **All Sites** again. Click on **Builder** for the site which URL we have used in the **External Booking Site URL**.



2. It will open the digital experience.
3. Click on the gear icon here to open **Page Properties**.



4. Click on **New Page**.

The screenshot displays the 'Page Properties' dialog box. On the left, a sidebar lists various pages and objects. The 'Home' page is currently selected. At the bottom of this sidebar, a blue button labeled '+ New Page' is highlighted with a red rectangular box. The main area of the dialog is divided into two tabs: 'Properties' and 'Page Variations'. The 'Properties' tab is active, showing several configuration fields for the selected page. These fields include 'Name' (set to 'Home'), 'URL' (set to '/'), 'API Name' (set to 'Home'), 'Page Access' (set to 'Site Default Setting: Public'), 'SEO' (with a descriptive text and a 'Learn More' link), 'Title' (set to 'Home'), and 'Description' (with a placeholder text). Each field has an information icon (i) to its left. The 'New Page' button is located at the bottom of the sidebar, below the 'File' object.

Home

Page Properties

Pages

Find a page...

Home

Account Management

> Action Plan Object

> Action Plan Template Object

> Campaign Object

> Case Object

Contact Support

Create Record

> Dashboard Object

Error

Feed Detail

> File Object

+ New Page

Properties Page Variations

Name Home

URL /

API Name Home

Page Access Site Default Setting: Public

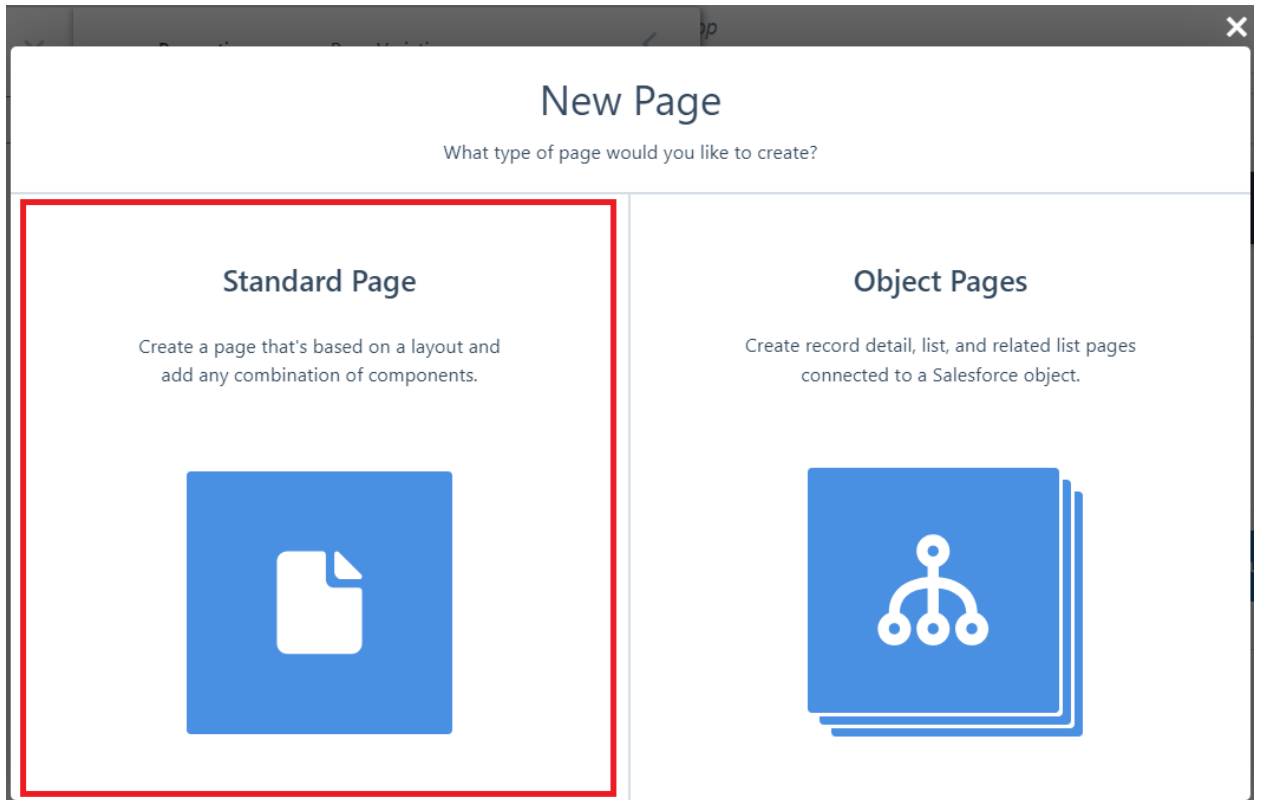
SEO

Help people find your pages more easily by adding search engine optimization (SEO) properties. The text fields in this section are translatable. [Learn More](#)

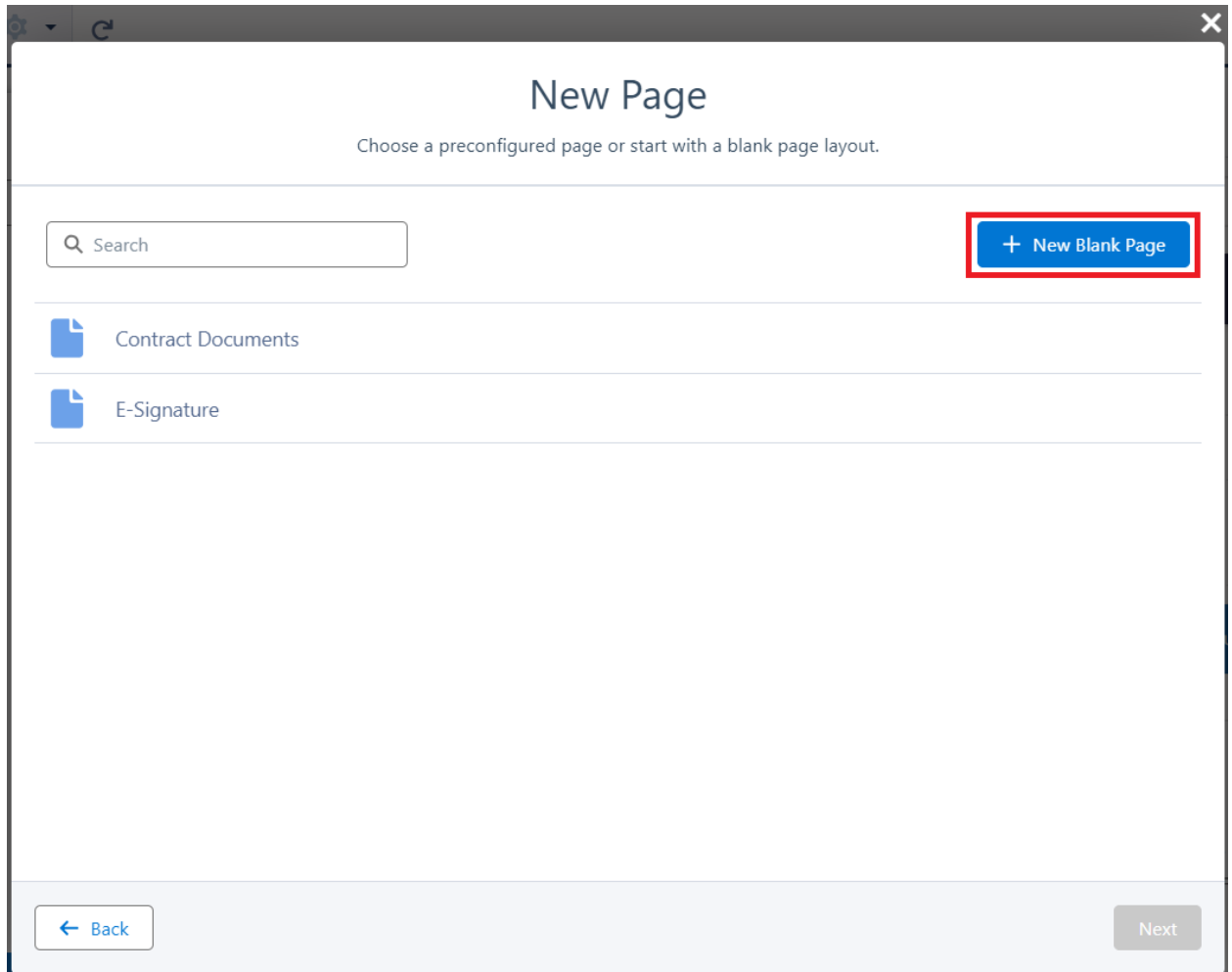
Title Home

Description Page description that can appear in search engine results.

5. Select **Standard Page**.



6. Click on the **New Blank Page**.



7. Select **1 full-width column** page layout and click on **Next**.

The screenshot shows the 'New Page' dialog in Salesforce. The title is 'New Page' with a subtitle 'Choose a content layout that defines the regions of your page.' Below this, there is a section titled 'Introducing Flexible Layouts' with a 'New' badge. It states: 'Gives you the most control over your page and its layout' and 'Build your own layout by adding full-width sections across your page. Create up to six columns within each section, then resize them for the ultimate flexible design. Add sections to build out the page and stack them as you wish.' Below this, there is a section titled 'Current Layouts' with four options: '1 full-width column', '2 columns, 1:2 ratio', '2 columns, 1:1 ratio', and '2 columns, 2:1 ratio'. The '1 full-width column' option is highlighted with a red box. At the bottom, there are 'Back' and 'Next' buttons. The 'Next' button is also highlighted with a red box.

8. Configure values as per the data shown in the table.

Property	Property Value
Name	Reject Quote
URL	reject-quote
API Name	Reject_Quote

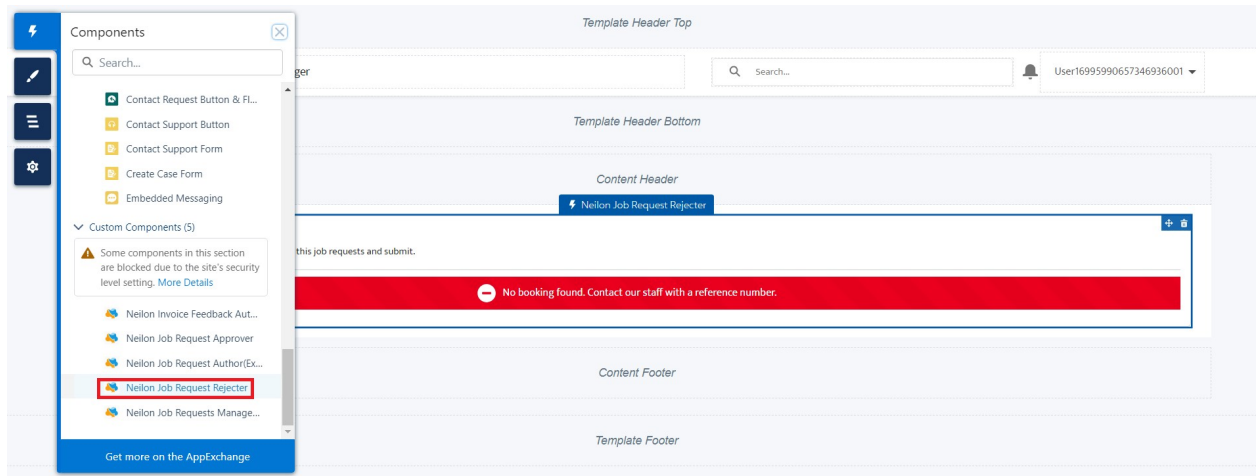
10. Click on the top left-side gear icon of the **Page Properties** and set **Page Access** as **Public**.

The screenshot shows the 'Page Properties' dialog for a page named 'Reject Quote'. On the left, a sidebar lists various page types, with 'Reject Quote' selected. The main area is divided into two tabs: 'Properties' and 'Page Variations'. The 'Properties' tab is active, showing fields for Name, URL, API Name, Page Access, SEO, Title, and Description. The 'Page Access' field is highlighted with a red box and set to 'Public'. The 'SEO' section includes a description of search engine optimization properties and a link to 'Learn More'.

11. After that, click on the **Components** button.

The screenshot shows the 'Components' panel in the Quip interface. The panel is titled 'Components' and features a search bar and a list of components. The components are organized into sections: 'Template Header Top', 'Template Header Bottom', 'Content Header', 'Content', 'Content Footer', and 'Template Footer'. The 'Content' section is currently selected, showing a list of content components.

12. Drag and drop **Neilon Job Request Rejecter** to the **Content** section.



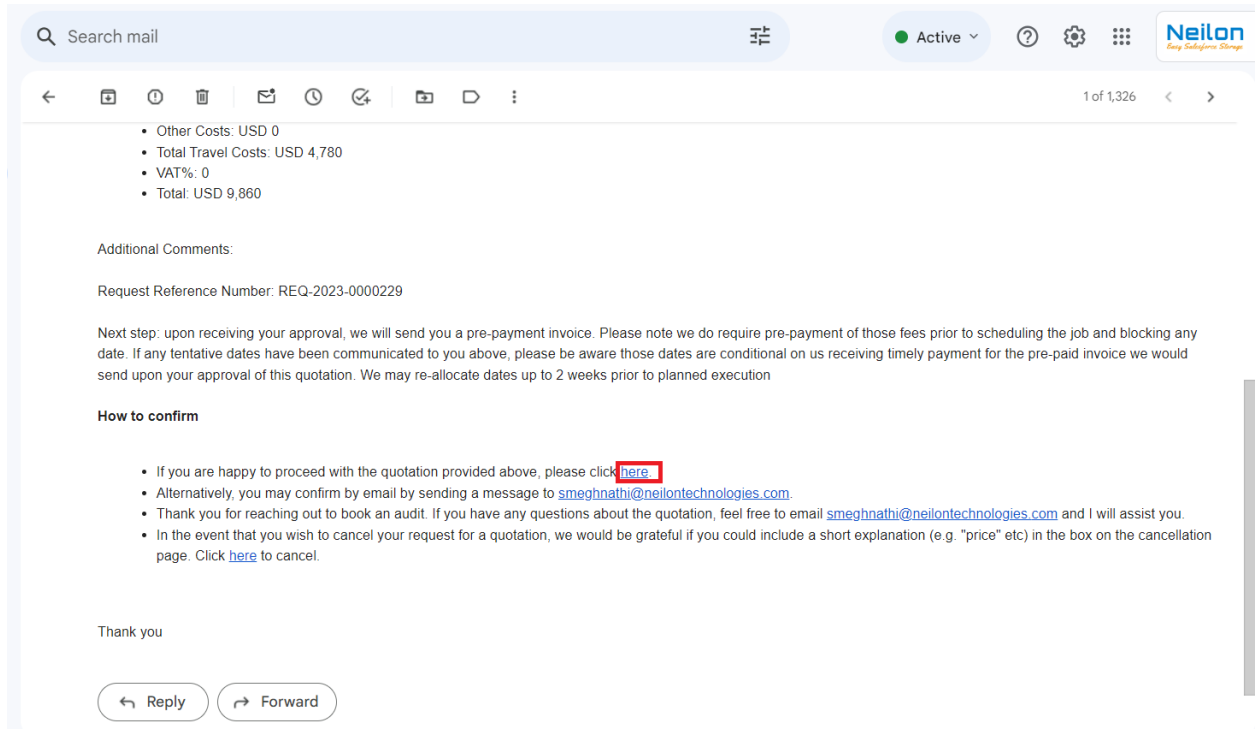
13. Click on the **Publish** button at the top-right corner to publish the page. It will show a site publish confirmation popup. Click on the **Publish** button.

14. You will get a confirmation email once the site is published successfully and live.

Approve & decline job request quotation steps

Here are the steps that need to be performed by the job requester to approve & decline the job request quotation using the approve and decline links from the job request quotation email.

1. Here is the job request quotation email received by the requester. Requester can click on the **here** link to approve the job request quotation. The job request quotation will be approved.



2. Similarly, the requester can also click on the **here** link to decline the job request quotation. The job request quotation will be declined.

