

Pricing Approval Help

This is an additional help given to sellers apart from User Training on how to use Approval Workflows. Please follow below steps to submit any shopping cart for approval.

- Once a discount is given on any product (parcel or postal products) or there is a need for Customised Pricing, you need to click on Reprice so that discount becomes effective in Apttus.
- Select Pricing Reason and Competitor Information for the product on which approval is required.
- Click on Submit for Approval button which will open a screen where you can see the approver details.
- Make sure to click “Submit with Attachments” if you want an approval to be submitted with attachments. For parcel products details like Customer Information, Customer Profile etc. can be submitted as part of an attached document.
- Once you click on Submit with Attachments, you will see a screen with a question whether you want to proceed without attaching attachment. Click No and it will redirect you to Proposal screen.
- On Proposal, go to Notes and Attachments related list and Attach the required document using Attach File button.
- Once the document is attached, click on Add button. It will take you to shopping cart. From there, click on Submit for Approval. After the preview screen, click on Submit with Attachments.
- You can now select the document which you attached on proposal and click on Submit.
- It is recommended to enter a Submission Comment so that Approver can see those comments and act based on that.
- Once your approver Approves the request, you will get a notification and can continue the next process based on your training.