

Configure Catalog Approvals

Grab & Go covering configuration of an approval workflow for changes to your internal catalogs.

DEFINE CATALOG APPROVERS

- 1. From the 'Company Users' tab, select to create or edit an existing user.
- 2. Enter the basic user information and select the Approver role or any combination of roles that include 'Approver'.
 - Only Master Admins can create other Master Admins and Administrators.
- 3. If the approver is also a *Marketplace* shopper you must assign a 'Content View'. Otherwise this is optional.

APPLICABLE CATALOG

- 1. From each Catalog's settings, assign an Approver(s).
- 2. Click 'Approvers' to select and assign approvers from the list of predefined users.
 - You may assign multiple approvers to a single catalog. In this case, the first approver to review and approve changes, removes the requirement for other approvers.
- 3. Save your changes.

DEFINE APPROVAL RULES

Configure when the system should generate email notifications for content Approvers to review and approve or reject catalogs that they have been assigned as approvers for. This approval applies to new catalogs or



Edit Catalog		ж
*Catalog Name:	Cintas	
Catalog File:	🗶 📓 BROWSE	
*Catalog Language:	General	
Image File (.zip):	🗶 📓 BROWSE	
Supplier Company:	CINTAS CORPORATION #054	
External Catalog		
Direct Item Update		
Fixed Order Quantity		
Do not transfer item description on checkout		
ADDITIONAL FIELDS		r
EXTERNAL CATALOG DEFINITION		e.
CONTENT VIEWS		r
APPROVERS		r
* Required Field	SAVE Reset Carry	281

USER SETTINGS						
	*E-mail:	nichole.whitaker+catalogs	@vroczi.com			
	*First Name:	Approver				
	*Last Name:	One				
	Password:	Reset Password				
	*Role:	Master Administrator				
		Approver	_			
		Buyer Shopper View Only				
Default Preferences						
Language:	ENGLISH (US)	٠	Search Language:	GENERAL	٠	
Time Zone:	(GMT -12:00) ENIWETO	ok, kw≉ ¥	Date Format:	DD.MM.YYYY	٠	
Decimal Notation:	1,234,567.89	٣				
					B on c	-
 Required Field 					C onne	Sealer Sealer



updates to existing catalogs awaiting approval before being pushed 'LIVE'.

- 1. Select *Company Settings* off the drop-down menu by clicking on it.
- 2. Scroll down to the Approval Workflow of the Company Settings area.
- **3.** Expand the *Approval Workflow* area by clicking on the carrot.
- 4. "For any change to required field in catalogs and/or quotes" If there is a change to the mandatory fields of an item that already exists in the previous version of the

APPROVAL WORKFLOW			
For any change to required field in catalogs and/or quotes For any new item added to catalog and/or quotes			
	If price changes more than 5 percent in catalogs and/or quotes		
		💾 SAVE	<u>Cancel</u>

catalog, then an email notification will be sent to the assigned *Approver* to approve or reject this type of change if this box is checked.

- 5. *"For any new item added to catalog and/or quotes"* If there is a new item being added to the catalog or quote, then an email notification will be sent to the assigned *Approver* to approve or reject if this box is checked.
- 6. "If price changes more than X percent in catalogs and/or quotes" Master Administrators can specify a percentage (%) value if the price of an existing item changes by more than the specified percentage value. An email notification will be sent to the assigned Approver to approve or reject if this box is checked.
- 7. If you check the last box, you may choose to update the percentage value.
- 8. Save.

See <u>Catalog Administrator</u> guide for how to approve or reject catalog content.