Price List Inbox

Module Guide: Purchase Price List Inbox

Module Location

Purchasing > Price Settings > Price List Inbox

Module Objective

The **Purchase Price List Inbox** module serves as the approval center for all purchase **Price List** documents that have been created and submitted. This module is used by a superior or manager to conduct a final review and provide approval before a supplier's price list officially becomes effective in the system.

1. Main View (Price List)

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



View Explanation & Filters

This page provides a summary of all price lists that are awaiting approval.

- **Filters**: You can search for a specific price list by **Price List Number**, **Item Category**, or a date range (**Date From / Date To**).

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

Column Explanation

- **Price List Number**: The unique number of the submitted Price List document.
- **Price List Date**: The date the price list was created.
- **Price List Status / Approval**: Icons that indicate the document's status and the approval process status.
- **Updated By**: The name of the user who last updated the document.

2. Approval Process Steps

The following is the standard workflow for an approver.

Step 1: Access the Inbox

Open the **Price List Inbox** module to see the list of price lists that require approval.

Step 2: Review the Price List Details

Click on one of the rows in the table to open its detail view. In the detail view, you can check all the information that has been input, such as the product details and the prices offered by the supplier.

Step 3: Provide Approval

After you open and review the price list details in Step 2, you will find the buttons to grant approval (e.g., **"Approve"** or **"Reject"** buttons) **within that detail page**. Click the appropriate button to complete the review process.

3. Workflow & Integrated Business Process

1. **Submission**: A user (e.g., a purchasing staff) creates a document in the **Price List** module and clicks **Confirm**.
2. **Entering the Queue**: The confirmed price list automatically enters the queue in this **Price List Inbox** module.
3. **Review & Approval**: A manager or approver opens this module, reviews, and provides approval.
4. **Price Activation**: After approval, the price list becomes the active and official price reference to be used when creating a **Purchase Order**.

Revision #2
Created 12 August 2025 09:32:04 by Sayu
Updated 12 August 2025 09:38:01 by Sayu