Assigning Budget Centers & Purchasing Orders Order Approvals

Quick guide for Administrators on StaplesAdvantage.com



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Create a new Supervis Supervisors can approve of	sor orders and access selected adn	inistrative functions and	
reports.			
Create a new Associat	te		
Associates can place orde	ers and change their password.		
Search for a User P	rofile		Edit User Profiles
Enter as much informatio	n as you know about a particul	ar user then click 'Go' to	Select any user from the list below, then click an action.
search. Search results wil	l display in the dialog box to th	e right.	O user(s) found
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By User's Supervisor/ Administrator:	Any		
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System Requirements:

For the best experience and Interface StaplesAdvantage.com is supported on the following computer operating systems and the most up to date version of various web browsers.

Operating Systems

Windows 7, Windows 2000, Mac OS X

Web Browsers

Internet Explorer <u>latest version</u> Google Chrome <u>latest version</u> Mozilla Firefox <u>latest version</u> Safari <u>latest version</u>

Administrator Capabilities:

- Manage Users: Add and delete users, modify user information, reset passwords and modify approval settings
- Order Approvals: Some organizations require that some or all orders be approved by an Administrator before they are submitted

Approvers review, modify or decline orders

Global Approvers can review, modify or decline orders that they are set up to approve as well as orders that routed to another person for approval

- Create Shared Shopping Lists: Create and modify shopping lists to be accessed by all your StaplesAdvantage.com users
- Reports: Access your reports to gain insight into your organizations spend

Manage Users:

Manage Users allows you to add and delete users or modify user information

- Hover over Account in the header and select Manage Users
- Click on the appropriate level of user you wish to create:
 - Administrator Approves Supervisor orders, is the second level of approval for Associate orders (if applicable) and has access to additional functionality
 - Supervisor Creates and submits orders. This is the first level of approval for Associate orders (if applicable) and may have access to additional functionality
 - Associate Creates orders that may require approval by a Supervisor
- You will be prompted to enter required information to complete the new user profile

You can also search for an existing profile to edit, modify or delete. To save you time, copy an existing user and modify their name and information specific to the new user being created.

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Setting Up Approval Routing

When setting up a new user, you will add in their required information and have the ability to include the following options:

A Blocked item override privileges

- Can order blocked items
- Orders containing blocked items must route for approval – note: an approver must be specified when this option is selected
- Check either box above or leave blank for user to not be allowed to order blocked items

Approval requirements and spend limits

- No spending limits
- Route all orders for approval
- Route orders for approval when
 - Orders are not within the following user spending limits: Define an order minimum Define an order maximum
- Orders exceed the following line total dollar maximum Define dollar maximum
- Select a supervisor/approver by using the drop down menu to specify user
- D Click next

Manage Credit Card Information

- If you do not want to manage credit card information for a user, click next
- Or choose their purchase information privileges by checking the box on the following options:
 - Do not display credit card information to user.
 - Allow user to edit but not save to profile (credit card information can be changed for individual purchases, but cannot be saved to profile).
 - Allow user to edit and save to profile
- Add a new credit card
- Click next







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When setting up a new user, you will add in their required information and have the ability to include the following options:

Assigning Budget Centers

Select an authorized ship-to location to view available Budget Centers

- A To authorize a user for specific budget centers, select from the list of available budget centers
- B Click Add Selected to move the selected information to the column on the right
- C To authorize all currently available Budget Centers click Add All
- D To authorize User for All Current and Future Budget Centers, check the box
- **E** To assign a default Budget Center, select one from the list of Budget Centers above and click Assign Default
- 🕖 Click next

Assigning Purchase Orders

Select an authorized ship-to location to view available Budget Centers

- **G** Select an Authorized Ship-To Location to view available POs
- To authorize this user for specific POs, select them in the list of Available POs
- Click Add selected
- To authorize all currently available POs click Add all
- To assign a default PO, select one from the list of POs above and click Assign default
- Click next

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BC-003:BUDGET CENTER 003	Add All
BC-005:BUDGET CENTER 005	
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There are two easy ways Approvers can view, modify, approve or decline their pending orders before submission.

Approve Orders from Your Home Page or Account Tab

- A Review the order displayed on your home page
- Or hover on Account, and select Approve Orders from the drop down menu
- C Click Approve or Decline if picking Decline, you must enter a reason

Review All Orders Pending Your Approval

All orders pending your approval will be presented
 Use the left hand filters to search by order
 number, approver, ordered by or budget approvals

Global Approvals

Global approvers can approve orders for all users and approve orders if an approver is not available.

- To find orders submitted to another Approver, click on Click Here button
- G Or click on "You can view orders pending approval for all users by Clicking Here" in order to see all pending orders for approval

Review or Modify an Order

Click on the order number to review or modify the order

- Click Modify, to:
- Add a PO, PO Release or Budget
- Change the method of payment
- Edit the delivery date
- Don't modify
- Note: the Ship-to address cannot be changed
- Leave a comment if desired
- Click Submit Order

