

Purchasing Management

-Setting up a new requisitioner

1. Hover over the ACCOUNT tab on the navigation bar and select Purchasing Management. Select ADD.



2. Fill out the specific boxes and choose Set Payment Method and select USE. When finished, click on ADD.

REQUISITIONERS			INT	
ADD REQUISITIONER A	CCOUNT	Email address:	You@YourCompany.com	
Email address:	You@YourCompany.com	Department:	Production	
	Copy me on shipment emails	Monthly Threshold: Auto approve order, if total	rdered for month, is less than:	500
Department:	Production	Order Threshold: Auto approve order, if order	is less than:	5000
Monthly Threshold: Auto approve order, if	total ordered for month, is less than: 500	If either threshold is \$0, then a your approval.	Il orders from this Requisitioner	will require
Order Threshold: Auto approve order, if	order is less than: 5000	Assigned payment method:	Change Pay	ment Nethor
If either threshold is \$0, your approval.	then all orders from this Requisitioner will require	Put this order on your credit li account. PO number is required.	Credit Line	
Assigned payment meth	od: Set Payment Method	If you do not currently have will contact you to establish	a credit line we one.	
	ADD CANCEL 30		A00	CANCE
	R.S. Hughes representative at 1 877 RSHUGHES (1 877 774			_

-Editing a requisitioner

1. Hover over the ACCOUNT tab on the navigation bar and select Purchasing Management.



2. Locate the specific requisitioner from the list and select Edit from the Action column.

REQUISITION	ERS				PM R	EPORTS
Name	Email	Dept	Order	Month	Current	Action
Erin Lucca	You@YourCompany.com	Production	\$5,000	\$500	\$0	Edit
Total					\$0	
ADD	Deactivate					HELP

3. Edit the information and click on SAVE.

ľ					\otimes
l	EDIT REQUISITIONER ACCO	UNT			
Y	Name:	Erin Lucca			
l	Email:	You@YourComp	any.com		
l		Copy me on a	shipment emai	ls	10
l	Department:	Production			
l	Monthly Threshold: Auto approve order, if total of	ordered for month,	is less than:	750	
ł.	Order Threshold: Auto approve order, if order	is less than:		10000	
l	If either threshold is \$0, then a your approval.	all orders from this	Requisitioner	will require	
l	Assigned payment method:		Change Pay	ment Method	
ľ.	Credit Line		1		
l	Put this order on your credit li account.	re 👔 Credit Line			- []
L	If you do not currently have	a credit line we			real
l	will contact you to establish	one.			
l					our 74.8
	Remove This Requisitioner				
l				4	
I			SAVE	CANCEL	
h					

-Editing, approving, or rejecting an order

1. Hover over the ACCOUNT tab on the navigation bar and select Purchasing Management.

2. Locate the specific order and select Edit/Approve/Reject.

PANY ACCOUN	T QUICK LISTS	(1) 🖳						<u> </u>
Quick L	sts		ORDERS PENDI	NG APPROVAL				
Orders	listory		Name	Date	PO No	Order No	Amount	Action
Advanc	ed Reports		Erin Lucca	05/31/2019	586-098	A5577627	\$911	Edit/Approve/F
Purchas	ing Management	accio					Approve, Rej	ect, or Edit Pend
Invento	y Managemenny	-2210						
ISIN Your Ac	count	Touch	ORDERS APPRO	OVED / REJECTED		11/30/2018	- 05/31/2019	REFR
Sign Ou	t							

3. Here you can edit the order, add comments, or add a P.O. number. When finished, you can either reject or approve the order.

Shippi The shippir	ng to be determined g cost for these items will be determined when we shi	p them. —	Details.		
	Product Information 38 Iost: Adapter 06534 Item Code: 051115-06534 0508 Cents Tax Exempt	Qty 10 Updat Remov	Unit EA ©	Price \$53.82	Subtotal \$538.20
I	3M Cubitron 77TF Aluminum Oxide Abrasive Cont Arbor Attachment - 20617 Nem Code: 051141-20647 805 Certs Tax Exempt Include Certificates	Updat Ramos		\$3.03	\$30.30
*	Impacto 501-00 2X Glove Liner Item Code: 501-00 2X 505 Certs Tax Exempt	10 Updati Remov	PR 0	\$20.34	\$203.40