

User & Site Management

Account Administrator

Customers with multiple users and/or multiple sites will be able to nominate an account administrator. The account administrator will be able to

- Set approval and approver limits for other users,
- Add new users,
- Edit user information like name and email address

Customer Code : 014737 (Inactive)

Order Limit : \$999999.00

Requisition Limit : \$999999.00

Approval Limit : \$0.00

Hide In Account Select :

Approval Group :

Approval Minimum : \$0.00

Enable to Aggregate Orders : No

Cost Centres

Customer Code : 1234567

Customer Name : ABC Clinic

Cost Centre Code	Name
Modify : New : Delete	
0 records: (1 page)	

User Maintenance
Create and maintain users

E.g. Managing user order, requisition and approval limits. Add a limit that the user is able to approve for other users. Add your cost centres to the customer account.

Manage Multiple Customer Accounts (Super Users)

Switch Account ABC Clinic

Account Select

Please select your account from the list below, or use the search facility to look up the account Name or Code.

Account Code or Name **Search** **Clear**

Contains **Starts With**

Code	Name
1234567	ABC Clinic
263975	123 Residences
129734	XYZ Facility

If you manage multiple SSS Australia customer accounts (e.g. multiple site group), you can now switch between them quickly and easily using the switch account function.

In your order dashboard, you can also view the order history and invoice history for all of the accounts you manage, so it is easy to review for multiple accounts.

! NB: If you need to be set up as a super user, please contact your personal account manager.

Order Compliance

Customers can set approval protocols with two parameters;

1. Budget restrictions
2. Approved product lists

! NB: Approvals need to be set up by SSS Australia. Contact your personal account manager if you would like to utilise approvals on your account.

Budget Restrictions

Budget restrictions can be set up by account administrators in the “User Maintenance” section of the dashboard, or by SSS Australia. There are two types of budget restrictions, Order Value and Requisition Value.

Order Value is how much that user is approved to order without the order needing to go for approval. If the user does not need an order value restriction, set the value to \$999,999.

Requisition Value is the absolute limit a user can order (approval or not). Keep in mind if you set a requisition limit, the user will be denied the ability to send orders over that value for approval, meaning the approver will not even be notified of the order attempt. We recommend using this feature sparingly. If the user does not need a requisition value restriction, set the value to \$999,999.

To set a user up as an approver, you just need to place a value in the Approval Value section that is higher than the users Order Value. This gives customers the ability to set up multiple approvers at different value breaks.

SearchUserAccountsNew User

User Email Address :kaitlyn.topping@sssaustralia.com.au

First Name :Kaitlyn

Surname :Topping

Search For :

Contains

Starts With

Search

Users Email Address	Customer Code
<input checked="" type="radio"/> kaitlyn.topping@sssaustralia.com.au	000827
<input type="radio"/> kaitlyn.topping@sssaustralia.com.au	000828

Modify : New : Delete

2 records. (1 page)1

Customer Code :000827 (Inactive)

Order Limit :\$1.00

The maximum dollar amount allowable for the user's orders before approval is required.

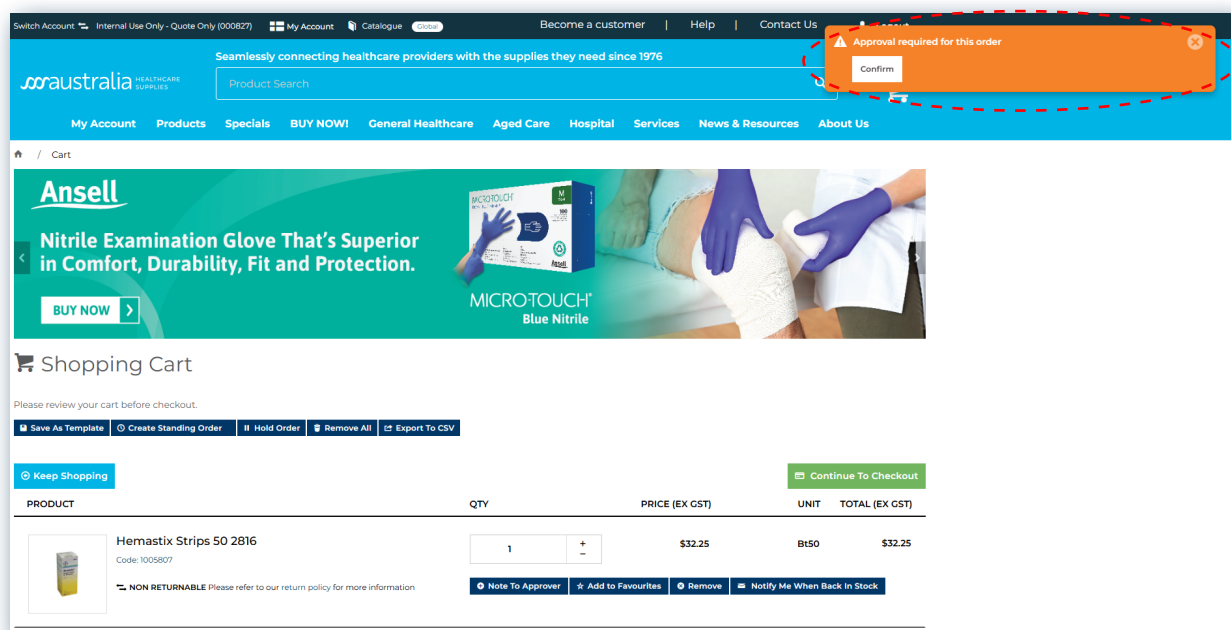
Requisition Limit :\$999999.00

The upper limit dollar amount the user can request for approval on this account.

Approval Limit :\$0.00

The upper limit dollar amount the user can approve on this account. (Applies only if the Customer uses order approvals.)

Approval Protocols

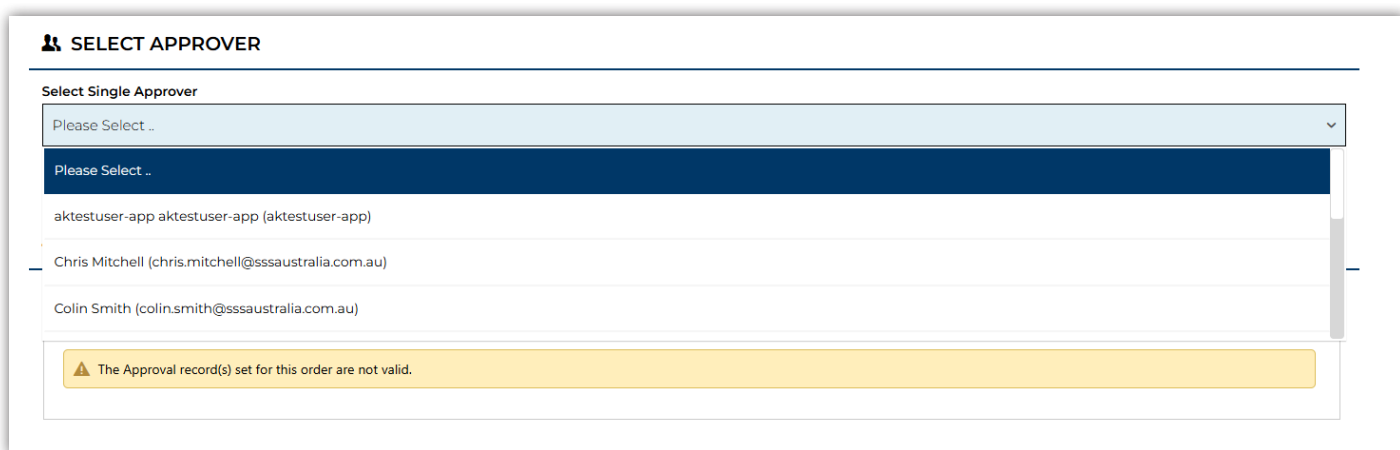


As an orderer, when navigating to your cart to check out you will see a notice at the top right of your screen “Approval required for this order”.

This is not an error message, it is just to notify you that the order will need to be submitted for approval.

Once you are ready to check out, in your Cart, click “Continue To Checkout”. On the next screen select your delivery address, enter your customer requisition information and then “Continue to Place Order”.

Now, at the bottom of the Order Summary screen under the Select Approver header, use the dropdown menu to select the correct approver for you order.

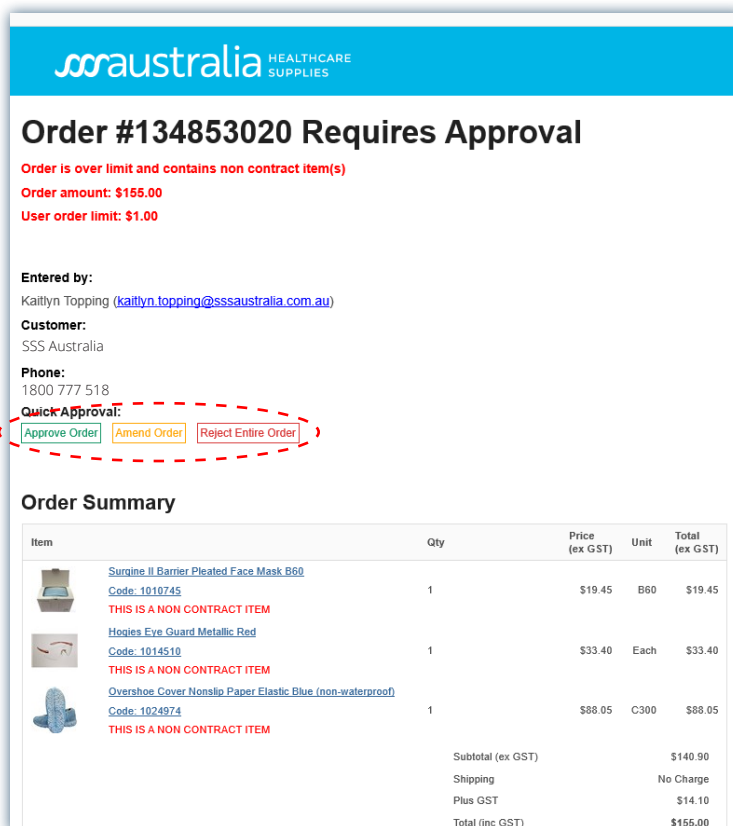


Then click “Process order” to send your order for approval.

Approval Emails & Dashboard

Approvers will receive an email with the order details. From this email they can directly approve, amend, or reject the order. If they choose to amend the order, the website will open for them to do so and then approve.

In the approvers dashboard, the approver will be able to review, edit and approve (or reject) orders they are responsible for reviewing. The orders will be placed on hold until they have been approved (or edited and approved). Orders requiring approval can be viewed in the dashboard by both the original order placer and the approver.



ssaustralia HEALTHCARE SUPPLIES

Order #134853020 Requires Approval

Order is over limit and contains non contract item(s)
Order amount: \$155.00
User order limit: \$1.00




Entered by:
Kaitlyn Topping (kaitlyn.topping@sssaustralia.com.au)

Customer:
SSS Australia

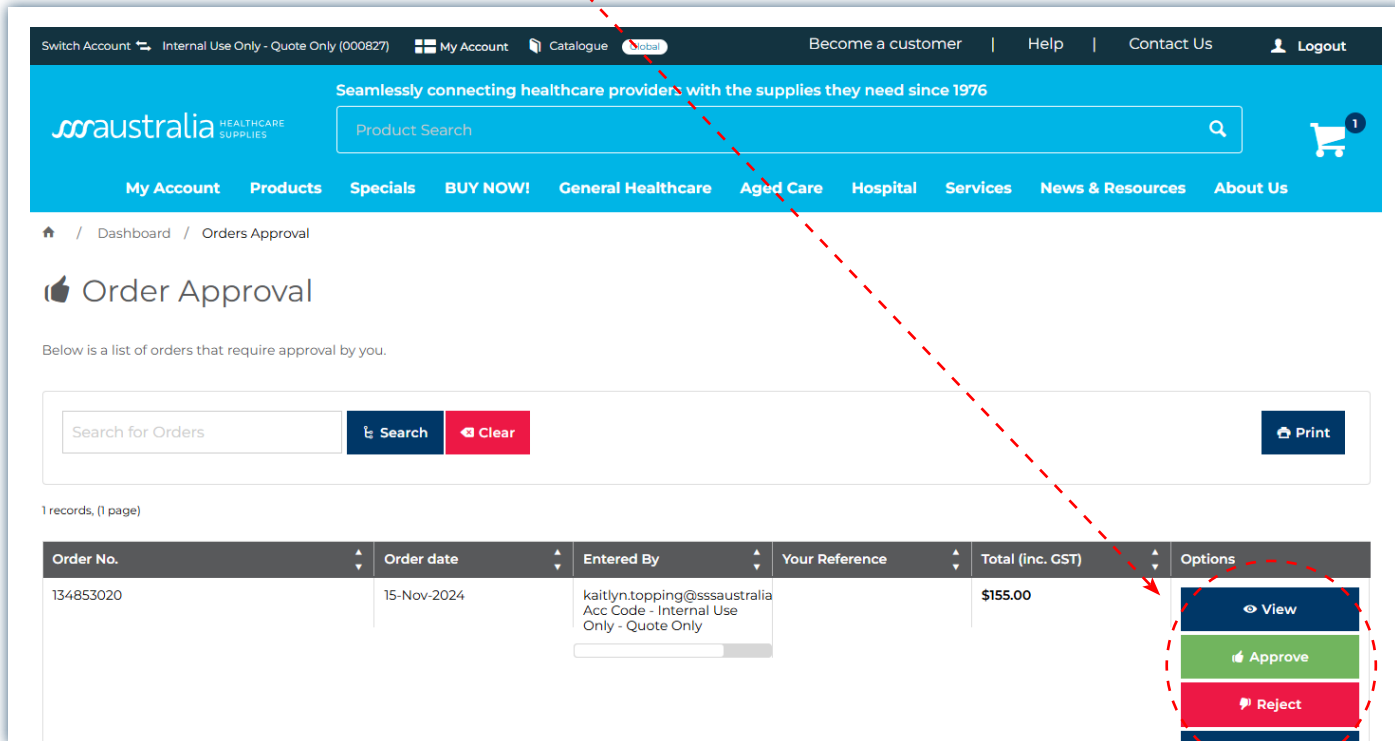
Phone:
1800 777 518

Quick Approval:
[Approve Order](#) [Amend Order](#) [Reject Entire Order](#)

Order Summary

Item	Qty	Price (ex GST)	Unit	Total (ex GST)
 Surgine II Barrier Pleated Face Mask B60 Code: 1010745 THIS IS A NON CONTRACT ITEM	1	\$19.45	B60	\$19.45
 Hosies Eye Guard Metallic Red Code: 1014510 THIS IS A NON CONTRACT ITEM	1	\$33.40	Each	\$33.40
 Overshoe Cover Nonslip Paper Elastic Blue (non-waterproof) Code: 1024974 THIS IS A NON CONTRACT ITEM	1	\$88.05	C300	\$88.05
Subtotal (ex GST)				\$140.90
Shipping				No Charge
Plus GST				\$14.10
Total (inc GST)				\$155.00

Email Example (approver)



Switch Account Internal Use Only - Quote Only (000827) My Account Catalogue **sssaustralia** Become a customer | Help | Contact Us | Logout

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Dashboard / Orders Approval

Order Approval

Below is a list of orders that require approval by you.

Search for Orders [Search](#) [Clear](#) [Print](#)

1 records, (1 page)

Order No.	Order date	Entered By	Your Reference	Total (inc. GST)	Options
134853020	15-Nov-2024	kaitlyn.topping@sssaustralia Acc Code - Internal Use Only - Quote Only		\$155.00	View Approve Reject

Dashboard Example (approver)