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

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)

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.

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 <u>not</u> 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.
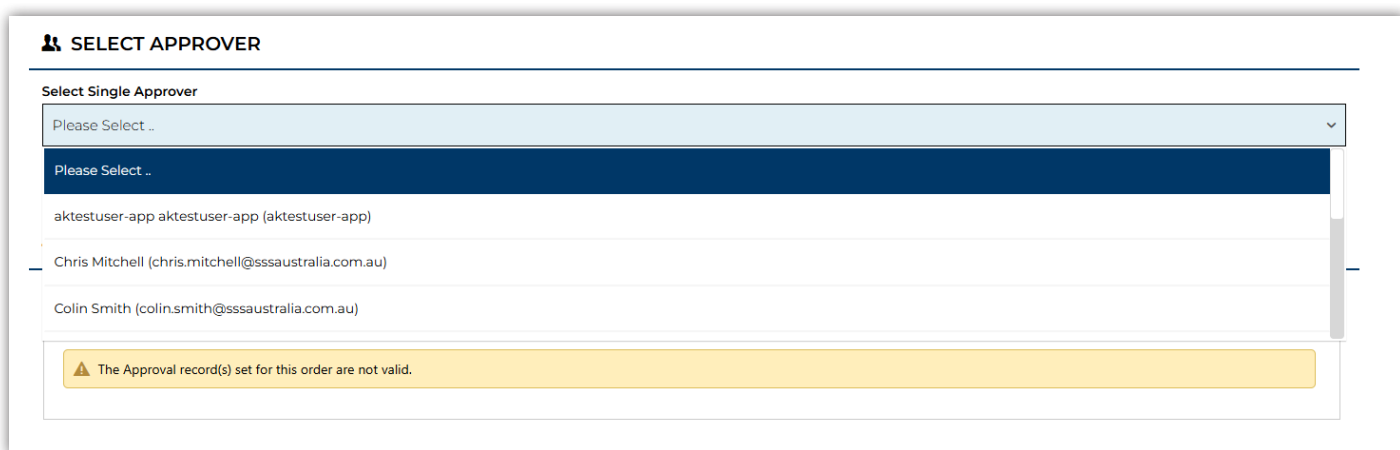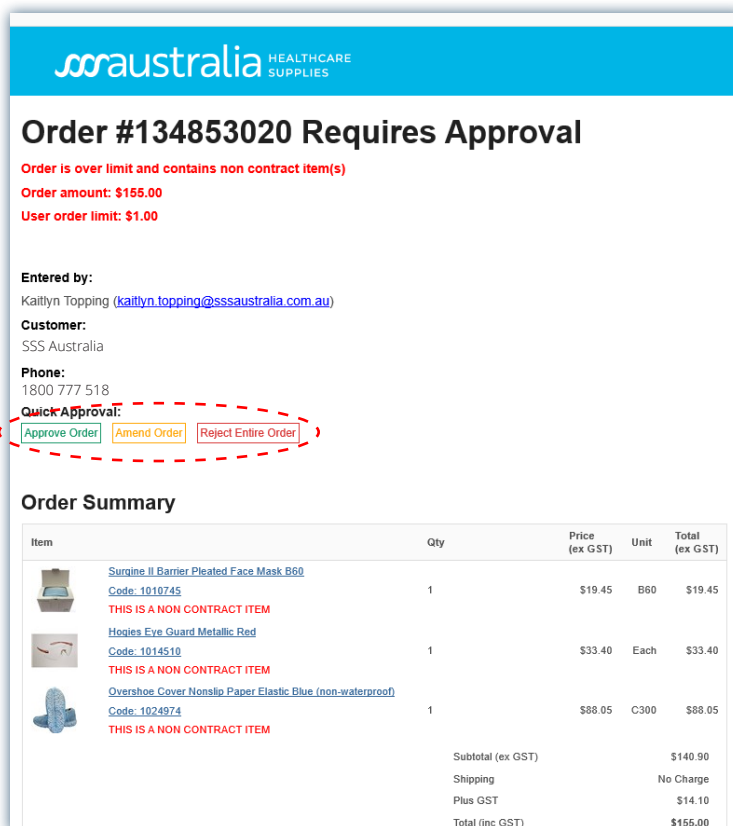
Then click "Process order" to send your order for approval.

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.

Email Example (approver)

Dashboard Example (approver)