

# User Administration & Order Approval Guide

v.1-2021

This guide will help you manage your employees' user accounts and process their orders through the order requisition and approval process. The first section will instruct you on how to set-up users so that your employees can log in to purchase their uniform. The last section will walk you through approving your employees' orders.

## Step 1: User Administration

To add or manage users on your eStore:

- Sign into your account
- Navigate to the MY ACCOUNT at top of the screen
- Visit the USER ADMINISTRATION page

**NOTE: This page can also be used to make edits to existing user accounts that are tied to your eStore. (Once a user is created, you can re-visit this page to make changes by selecting the existing username in the USER ADMINISTRATION page.)**

- Select CREATE NEW USER
- Fill out the appropriate fields: username, name, and email address

**NOTE: You are required to assign your employee to an approver to ensure that their order requisition will be submitted to that approver so that the approve may place the order on the employee's behalf.**

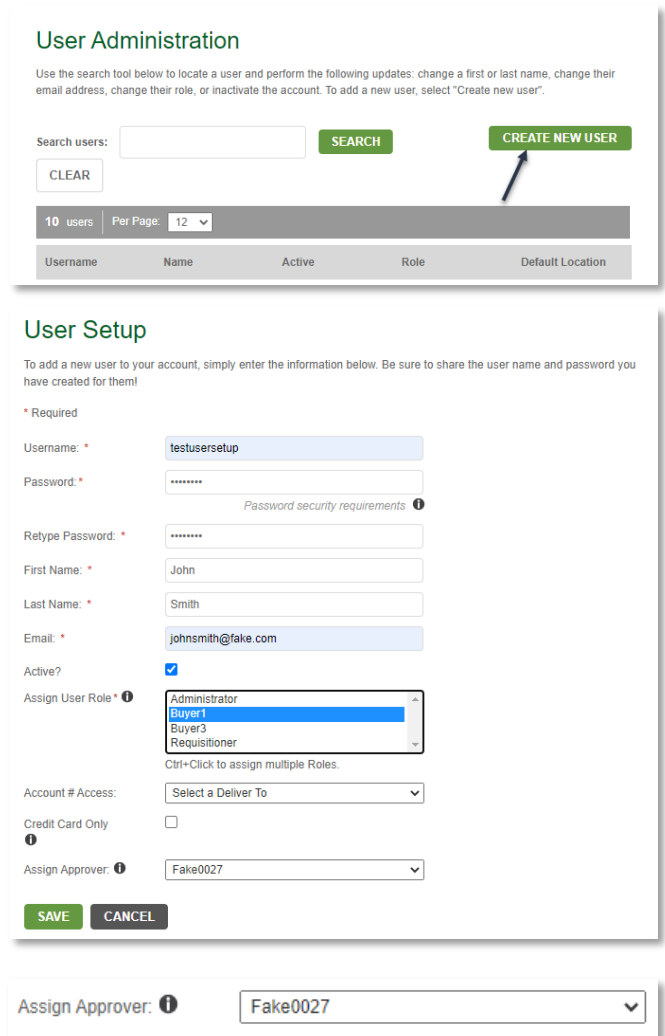
- Select the **Buyer1** User Role for employees that must submit their requisition for approval.
- Assign an **Approver**. Select a User who has a User Role of Buyer3 and/or Administrator so that they may review and approve requisitions and submit orders on behalf of the Buyer1 User.

**NOTE: Only users with the Administrator or Buyer3 User Role may place orders at Checkout.**

- Select SAVE to return to the USER ADMINISTRATION page
- **Optional:** To deactivate an existing user, uncheck the **Active** checkbox to prohibit the user's access to the account so that they will no longer be able to log in and place requisitions or orders



After the username has been created, your employees can now submit requests for approval. Follow the steps on the next page to approve requisitions.



The image shows two screenshots of a web application interface. The top screenshot is titled "User Administration" and includes a search bar with "SEARCH" and "CLEAR" buttons, and a "CREATE NEW USER" button. Below the search bar is a table with columns for Username, Name, Active, Role, and Default Location. The bottom screenshot is titled "User Setup" and contains a form for creating a new user. The form fields include: Username (testusersetup), Password (masked), Retype Password (masked), First Name (John), Last Name (Smith), Email (johnsmith@fake.com), Active? (checked), Assign User Role (dropdown menu with Administrator, Buyer1, Buyer3, and Requisitioner), Account # Access (Select a Deliver To), Credit Card Only (unchecked), and Assign Approver (Fake0027). There are "SAVE" and "CANCEL" buttons at the bottom of the form. A separate dropdown menu for "Assign Approver" is shown below the main form, also displaying "Fake0027".

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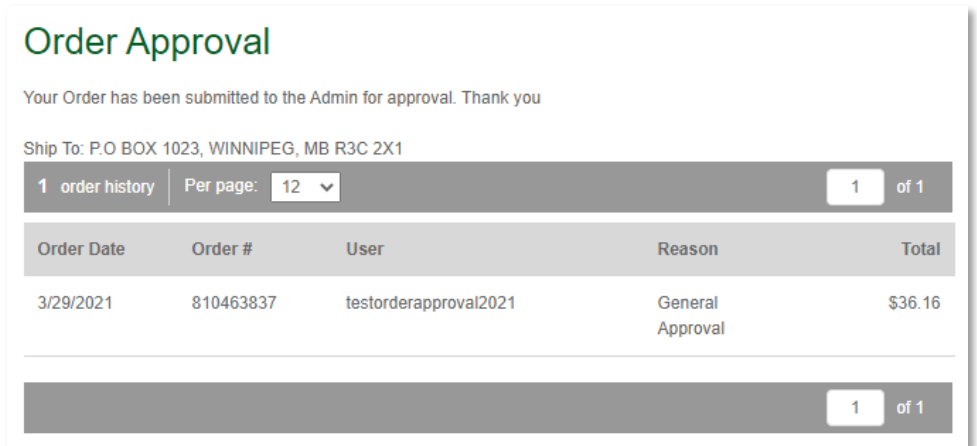
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## Step 2: Order Approval

Users with the Administrator or Buyer3 roles that have been assigned to approve a Buyer1 user's requisition will receive an Order Approval Notification email with details on any order that is awaiting their approval. The email will be sent after the user with the Buyer1 role completes their ordering process.

For an Approver to process a Buyer1 request:

- Navigate to ORDER APPROVAL within the My Account section.
- Select the Order # that is awaiting your approval
- Complete the similar steps as you would if you were placing your own order, including reviewing/editing the cart, shipping method and fees, and adding any desired Purchase Order number or reference
- Select PLACE ORDER when you are ready to submit your employee's order



**Order Approval**

Your Order has been submitted to the Admin for approval. Thank you

Ship To: P.O BOX 1023, WINNIPEG, MB R3C 2X1

1 order history | Per page: 12 | 1 of 1

Order Date	Order #	User	Reason	Total
3/29/2021	810463837	testorderapproval2021	General Approval	\$36.16

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The final order number will now be assigned, and the Approver will receive an order confirmation email.