Getting Started with Order Approval

To access the Order Approval business solution, please log in with an Administrator account* and navigate to the My Business Solution section.

Select **Order Approval Management** in the left navigation bar under My Business Solutions. If this link is not available to you, then you do not have Administrative options*. From here Administrators can set up permissions, spend limits and workflow assignments for all registered website contacts.

*Note: Administrator access is required to set up this functionality. Please contact our eCommerce customer care team at 800-753-7970 or customercare@mscdirect.com.

MY SHOPPING OPTIONS
- ▸ Pending My Approval (2)
- ▸ All Pending Carts (6)
- ▸ VMI Carts (0)
- ▸ VMI Pro Services (0)
- ▸ Saved Carts (7)
- ▸ Downloaded Carts (20)
- ▸ Quotes (22)
- ▸ My Lists (15)
- ▸ ControlPoint Carts (2)

MY BUSINESS SOLUTIONS
- ▸ PO Control (2)
- ▸ CMI
- ▸ Cost Allocation Management
- ▸ **Order Approval Management**
- ▸ Customer Part Numbers
- ▸ Account Administration

Add a New User
In the Order Approval Management setup screen, navigate to the Add New User option.

Order Approval Management

Getting Started

You can setup and manage Order Approvals from this page. For initial set up of Order Approval, click the "Update Order Approval Set Up Notifications" link below in order to select which emails you would like to receive when users register and/or place orders.

View the Role Descriptions | Update Order Approval Set Up Notification

Add New User   Export Users

Set Account User Default Settings

Depending on your preference, you can either send an email inviting the user to set up their own account **OR** you can set up an account for them by entering their first name, last name, phone and email address.

In addition, you can set a default for all new registrants. This can help control any spend on the account if necessary.

Order Approval management comes preloaded with default settings that will get applied to all new users. Depending on your preference, you can edit these settings via Add New User dialog box to set your own default permissions, spend limit and workflow assignments.

Add New User - Default Settings   X

New users will default to unauthorized approver status with a $100.00 spending limit and be assigned to LISA NECKAMEYER, LISA NECKAMEYER Edit these settings

How will you add new users to account?

◉ Send invite to user(s)   ○ I will setup their account

Email Address

Send   Add another email

Delete a User

In the Order Approval Management table, navigate to the column labeled Action and select the gear icon ⚙▾ for the user profile you want to delete. Deleting a user will deactivate their web account. User reactivation can only be accomplished by calling MSC Customer Care at 800-753-7970 or emailing customercare@mscdirect.com.

If the user you are deleting has outstanding carts awaiting approval, we will do a check and prompt you to reassign the pending carts to yourself or another approver.

☐ Name ▲	Authorized Approver	Spend Limit ▲	Assigned To	Action
Contact names are listed here.	Ⓐ	Admin has unlimited spending limit and is not assigned		
☐	◯	Unlimited		⚙▾
☐	🛡	$800.00	User names are listed here	Edit user profile Delete user

Edit a User's Permissions, Spend Limit and Workflow Assignments

In the Order Approval Management table, find the column labeled Action and select the gear icon ⚙▾ for the user profile you want to edit.

Select **Edit user profile** to:

- Check (or uncheck) Approver status which will allow/not allow a user to approve orders for others.

- Set a spend limit so he/she can place orders up to a predetermined dollar amount **OR** select the No spend limit checkbox to give this user unlimited spend.

- Set up workflow assignments by selecting from a list of approvers for any user that has spending limits. You can select up to 10 approvers, making this solution customizable for your company's needs. To be included in an Approver listing, the user must have Approver status and have a spending limit at least as high as the user needing approvals.

Alternately, you can elect to make a user an Administrator, thereby giving them the same permissions you have. Within Order Approval they have approval authorization on *any* order, unlimited spend, no workflow assignment and the ability to add, edit and delete users. There is no limitation to the amount of Administrators you can have on an account. However, once there is a Web Administrator assigned, there must be at least one Web Administrator at all times.

	Name ▲	Authorized Approver	Spend Limit ▲	Assigned To	Action
☐	Contact name will be here	🛡	Unlimited		⚙▼

Editing User Profile for | Contact name will be here

Save Changes | Cancel

Approver ☑
Permission to approve orders

Spend Limit
Can place orders up to:

$ 900.00

☐ **No Spend Limit**

Assigned to
Can submit orders for approval to:

☐
☐
☐
☑ User names are listed here
☐
☐
☐

OR

Admin ☐
Power user who can approve any order, has unlimited spending and is not assigned.

	Contact name will be here	🛡	Unlimited		⚙▼

Edit or Delete Multiple Users at one time

You can use a Bulk Action tool to make the same changes to multiple users. Use the check boxes to select the users you want to edit or delete. Choose your desired action from the Bulk Action menu and follow the prompts.

☐	Name ▲	Authorized Approver	Spend Limit ▲	Assigned To	Action
		Ⓐ	Admin has unlimited spending limit and is not assigned		
☑	**Bulk Action** ⚙	🛡	Unlimited		⚙ ▾
	Edit User Profiles				
☑	Delete Users	🛡	$800.00		⚙ ▾

To Use Order Approval

Now that you are set up, your team can start using Order Approval to submit and approve carts.

To Submit a Cart

A requester can submit their shopping cart, which has Order Approval settings, add a note to the buyer if applicable and click the "Send to Buyer" button.

The requester will receive a confirmation page with the details of his/her submitted cart along with a link to view their submitted carts.

How to Check the Status of a Submitted Cart

When a requester submits a cart for approval, they can view the status of their request up until the time the cart is approved and placed on order by the final approver. Start by navigating to the My Account area and clicking on **"My Submitted Carts"** in the left navigation.

On this page, the requester can act on carts with a status of pending or rejected by navigating to the column labeled Action and selecting the gear icon ⚙▾ for the cart they want to act on.

My Submitted Carts

[Order Approval Settings]

View your submitted carts below.

You can sort your submitted carts by clicking the description shown in each column. You can also take action on a cart by clicking on the "Action" drop-down tool and then selecting the desired action for that particular cart.

Date Sent ▼	Submitted To ▲	Total ▲	Ship-to Location ▲	Status ▲	Action
04/18/2019	Contact names are listed here.	$794.71 4 items ▾	MSC MELVILLE TEST 75 MAXESS RD MELVILLE , NY11747-3151	APPROVED	
04/18/2019		$3170.52 4 items ▾	MSC MELVILLE TEST 75 MAXESS RD MELVILLE , NY11747-3151	REJECTED	⚙▾
04/18/2019		$686.77 4 items ▾	MSC MELVILLE TEST 75 MAXESS RD MELVILLE , NY11747-3151	PENDING	⚙▾

For a cart with a PENDING status, you can:	For a cart with a REJECTED status, you can:
• Send an email reminder to the approver • Resubmit the cart to a different approver • Withdraw the cart from the approver	• Edit the cart and resubmit for approval • Delete the cart

Your cart will show a status of **APPROVED** once the buyer adds your requested items to his/her cart for purchase. If the buyer has only approved part of your request, you will see a partial approved status. You can then expand the cart contents to see which items have been approved. When the submitted cart(s) are not showing in the Submitted Cart area, the cart has been placed as an order with MSC. Once ordered, the transaction moves to Order History.

Approving a Pending Cart

A buyer can view all carts submitted to him/her by navigating to the My Account area and clicking on **"Pending My Approval"** in the left navigation.

On this page, the buyer can view a pending cart, approve a pending cart, reassign it to another buyer or reject the cart back to the requester by selecting the gear icon ⚙▼ for the cart they want to act on. When a cart is Approved, the items approved are moved to the active Shopping Cart to be processed and the Pending My Approval record status changes from PENDING to IN CART.

	Date Sent ▼	Submitted By ▲	Total ▲	Ship-to Location ▲	Status ▲	Action
☐	04/05/2019	**REQUESTER MERCURIO** 🖥 Training Notes	$372.15 4 items ▾	MSC MELVILLE TEST 75 MAXESS RD MELVILLE, NY 117~~ ~~	PENDING	⚙▼
						Approve & Add to cart
						Reassign to another buyer
☐	03/28/2019	**REQUESTER MERCURIO** 🖥 Testing purposes	$134.94 1 item ▾	MSC MELVILLE TI 75 MAXESS RD MELVILLE, NY 11747-3151		Reject Cart

If the buyer does not want to approve the entire cart, he/she can individually choose which items to approve by expanding the cart contents and checking the items they wish to move to their active shopping cart.

	Date Sent ▼	Submitted By ▲	Total ▲	Ship-to Location ▲	Status ▲	Action

☐ 04/05/2019   **REQUESTER MERCURIO** $372.15   MSC MELVILLE TEST   PENDING   ⚙▼

     🖥 Training Notes   hide items ▲   75 MAXESS RD

                                      MELVILLE, NY 1174̶7̶ ̶2̶1̶5̶1̶   Approve selected items

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MSC# 55937742   Qty: 1 $118.38 ea.   **$118.38**   ☑

VORNADO - 3 Speed, 13.2" Wide x 17"
High x 10.9" Deep, True HEPA Air Purifier –
125 CFM, HEPA & Carbon Filters

MSC# 37398211   Qty: 1 $111.99 ea.   **$111.99**   ☑

PRO-SOURCE - Electric, 12 Amp, 1,500 psi,
1.35 GPM, Cold Water Pressure Washer –
Axial–Cam, 20' x 1/4" Hose, 120 Max Volts

After any portion of a Pending Cart is approved, the Approver must go to their active Shopping Cart 🛒 to take action on those approved items. Click on the Shopping Cart icon to review, edit and advance the approved items to either the next Buyer/Approver or launch Secure Checkout to complete a purchase.

Approver Out of Office Setting

If an approver will be out of the office, he/she can simply turn on their Out of Office setting to notify requesters that they are currently unavailable to approve carts. However, if the requester chooses to submit a cart anyway, it will still go through to the out of office approver.

Pending My Approval　　　Order Approval Settings　Out of Office (ON)

Toggle ON or OFF

Pending My Approval　　　Order Approval Settings　Out of Office (OFF)

View your pending cart approvals below. You can sort your pending carts by clicking the description shown in each column heading. You can also take action on a whole cart by clicking on the Action drop-down "gear" tool for that cart and then selecting the desired action for that particular cart.

To selectively act on a portion of one Cart Pending Approval that contains more than one line item, click the hyperlink showing the number of items to view the item details. Making selection from this detail view will change the function of the Action drop-down tool to approve (move to Shopping Cart) only the selected items.

Selection of multiple carts using the check boxes will activate the Bulk action menu to permit a single action for several selected carts.

	Date Sent ▼	Submitted By ▲	Total ▲	Ship-to Location ▲	Status ▲	Action
☐	04/05/2019	**REQUESTER MERCURIO** 💬 Training Notes	$372.15 hide items ▲	MSC MELVILLE TEST 75 MAXESS RD MELVILLE, NY 11747-3151	PENDING	⚙▼