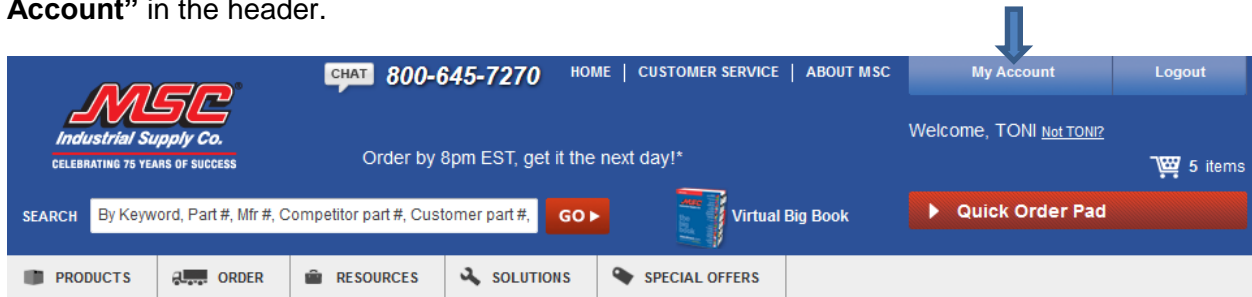


Setting up Order Approval

Only administrators have the authority to set up or deactivate users and their spending limits. To access the order approval section, please log in with an administrator account and click on **“My Account”** in the header.



METALWORKING TRIPLE PLAY: SAVE UP TO 35% ON MILLING, UP TO 30% ON DRILLING AND UP TO 30% ON INDEXABLES. ENTER CODE: MWTPH CLICK TO APPLY ▶

MY ACCOUNT HOME

- ▶ My Account
- ▶ My Profile
- ▶ My Preferences
- ▶ Accounts Payable
- ▶ Order History
- ▶ Item History
- ▶ Billing Information
- ▶ Shipping Addresses

MY SHOPPING OPTIONS

- ▶ Pending Cart Approval (1)
- ▶ Manage Carts (VMI/Saved)
- ▶ Quotes (0)
- ▶ My Lists (0)

MY BUSINESS SOLUTIONS

- ▶ PO Control (3)
- ▶ CMI
- ▶ Cost Allocation Management
- ▶ **Order Approval Set Up**
- ▶ Customer Part Numbers

Order Approval Set Up

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](#)

* New contacts will be assigned the role: Buyer Requisitioner

* New contacts will be assigned to:

SEARCH BY Search Contact:

Apply to Selected: \$

CONTACT	ROLE	ASSIGNED TO	SPENDING LIMIT	EDIT	DEACTIVATE	ALL
TONI TRUBISH	Administrator	Self	N/A	N/A		<input type="checkbox"/>
TEST FOR ME 1T OOMANY	Requisitioner	MARK DOBROSKI	\$100.00	Edit	Deactivate	<input type="checkbox"/>
TEST 2	Requisitioner	LAURA MERCURIO	\$0.00	Edit	Deactivate	<input type="checkbox"/>
TESTING 234	Supervisor	DAVID ACHTEMEIER	\$900.00	Edit	Deactivate	<input type="checkbox"/>
TESTING @ EMAIL	Administrator	Self	N/A	Edit	Deactivate	<input type="checkbox"/>
SAM A.	Requisitioner	DEAN ALLEN BLE	\$0.00	Edit	Deactivate	<input type="checkbox"/>

Click on **“Order Approval Set Up”** in the left navigation bar. From this link users can set up user roles and spending limits for all registered website contacts.

Note: Administrator access is required to set up this functionality. Please contact our eCommerce customer support team at 800-753-7970 or cust_service@mscdirect.com if you need to have administrator access established for your account.

Setting up Default User Roles and Assignments

As new members join your team, a default user role can be assigned. By setting the default roles and contact assignment, all of your new users will be ready to place orders.

Order Approval Set Up

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](#)

* New contacts will be assigned the role: Buyer Requisitioner

* New contacts will be assigned to: LAURA MERCURIO

SAVE →

ADD NEW CONTACT →

Setting up Individual Users and Spending Limits

To set up individual contacts, select the edit button next to the user you would like to change. Once clicked, the “**Edit Order Approval Set Up**” window will appear. Select the role, establish the user's assignee and create a spending limit if necessary.

SEARCH BY Search Contact:

Apply to Selected: <input type="text" value="- Set Role -"/> <input type="text" value="- Assign To -"/> \$ <input type="text"/> <input type="button" value="APPLY"/>						
CONTACT	ROLE	ASSIGNED TO	SPENDING LIMIT	EDIT	DEACTIVATE	ALL <input type="checkbox"/>
JOHN DOE	Administrator	Self	N/A	N/A		<input type="checkbox"/>
JOHN SMITH	Requisitioner	JOHN DOE	\$0.00	Edit	Deactivate	<input type="checkbox"/>
EDWARD JONES	Buyer	Self	N/A	Edit	Deactivate	<input type="checkbox"/>

* For any user with a spending limit, a supervisor, buyer or administrator must be assigned. When users exceed their shopping cart spending limit, a notification will be sent to the appropriate reviewer for approval. Once the proper role and spending limit is established, shopping carts and orders will automatically follow the approval system that has been set up.

Edit Order Approval Set Up for TEST 2

You can edit the order approval flow for the contact below.

Contact Name: TEST 2

*** Role:**

*** Assigned To:**

Spending Limit: \$

Shopping Cart User with Spending Limit


Users who place orders over their established spending limits will not complete the full checkout process. Instead the system will send their cart to their assigned buyer for review and approval before processing. Users can also add notes to the order if necessary.

After clicking “**Send to Buyer**,” the order summary screen displays, letting the user know their order was submitted for approval.


Shopping Cart

Current Shipping Address: canada is taxable [\(edit\)](#)

← CONTINUE SHOPPING
UPDATE CART
SEND TO BUYER →

1 ITEMS IN CART:	QUANTITY:	YOUR PRICE:	ITEM TOTAL:
 <p style="font-size: small; margin-top: 5px;">Electric Screwdrivers Handle Type: Pistol Grip Speed (RPM): 4000 Torque (in-lb): 81.00 Voltage: 120 Amperage: 6.30</p> <p style="font-size: small; margin-top: 5px;">Item #80484199 Add to List</p>	<input type="text" value="1"/>	\$124.36 ea.	\$124.36 X

STOCK STATUS: In Stock

ITEM NOTES: 

Routing Note:

Order Review and Approval (for Supervisors, Buyers and Administrators)

As a supervisor, buyer or administrator, users will receive an email notification when a shopping cart has been sent to the user for review and approval. By clicking the link in the email, they will be taken to the Pending Cart Approval page upon logging in.

From this page, they have the ability to add items from any pending cart into their own shopping cart and place the order. Simply click the checkbox to the right of the cart information and click the **“Add Selected to Cart”** button.

If a user would like to review cart details, reassign or reject the pending cart prior to placing the order, they should click the Ship-to Location to access the cart detail for additional information.

My Pending Carts (1) All Pending Carts (5)

Pending carts from last: [30 Days](#) | [60 Days](#) | [90 Days](#) | [180 Days](#) | [1 Year](#)

SHIP-TO LOCATION	DATE SUBMITTED	REQUESTER	APPROVER	# OF ITEMS	AMOUNT	<input type="checkbox"/>
75 MAXESS RD MELVILLE, NY 11747-3151	03/13/2013	JOHN SMITH	JOHN DOE	1	\$230.93	<input checked="" type="checkbox"/>

+ ADD SELECTED TO CART

+ ADD SELECTED TO CART

From here, users can add each or all of the items to their cart by clicking the checkbox to the right of the line item. They also have the ability to reassign the cart to another user or reject the cart. In either case, the requisitioner will receive an email letting them know what action you have taken. When all items from a pending cart have either been ordered or deleted, the cart will be removed from the Pending Cart Approvals page.

Pending Cart Approval - Cart View 03/13/2013 - Requested by JOHN SMITH


The cart below was submitted on 03/13/2013.

To reassign or reject a pending cart, use the options at the bottom of the page.

[<< Return to Pending Cart Approvals](#)

SHIP-TO LOCATION	DATE SUBMITTED	REQUESTER	APPROVER	# OF ITEMS
ECOMM BUSINESS TEST ACCT 75 MAXESS RD MELVILLE, NY 11747-3151	03/13/2013	JOHN SMITH	JOHN DOE	1 Item in Cart

+ ADD SELECTED TO CART

ITEM DESCRIPTION	ITEM #	YOUR PRICE	QTY	TOTAL	ALL
 Step Ladders; Type: Step Ladder; Material: Fiberglass; Industry Rating: Type IAA; Load Capacity (Lbs): 375; Height (Feet): 6; Number of Steps / Rungs: 6	74492943	\$230.93	1	\$230.93	<input type="checkbox"/>
! Item Currently in Shopping Cart					
				Total Amount: 230.93	

+ ADD SELECTED TO CART

Total Selected: \$0.00 | Selected: 0

Reassign Cart

The reassign function allows the user to reassign the pending cart approval to another authorized Approver. All applicable parties will be sent an email notification of the reassignment.

Send Cart To:

REASSIGN CART

Reject Cart

The reject function allows a user to reject a pending cart approval, a reject reason can be entered. The requester will receive notification once a pending cart approval is rejected. The rejected cart will be deleted from pending cart approvals.

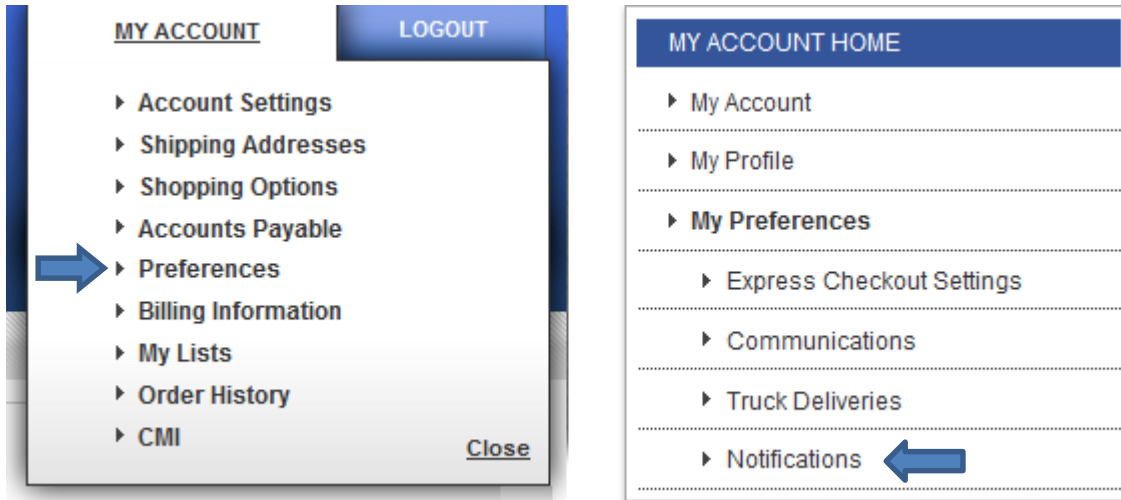
Reason for Rejection:

REJECT CART

Notifications Settings

To update your Order Approval notification settings, click the **“My Account”** in the top right hand of the screen, then select **“Preferences.”**

On the **“My Preferences”** page select **“Notifications”** on the left navigation panel.



Under the **“Order Approval Notifications”** section select how you would like to be notified.

