

# Purchasing Manager

Manage Rules and Approval Groups

# Search for Users to Add or Edit Their Rules

The screenshot shows the Quill.com Purchasing Manager interface. At the top, there is a navigation bar with 'Need Help', '1-800-982-3400', 'Chat', and 'Why Quill.com'. On the right, it says 'Track Order' and 'WELCOME, PLEASE SIGN IN My Account'. Below this is a search bar and a 'Fast Free Shipping' banner. The main navigation includes 'PRODUCTS', 'INK & TONER', 'COFFEE | SNACKS', 'CLEANING', 'SERVICES', and 'SHOP BY INDUSTRY'. The current page is 'Purchasing Manager: Manage Rules & Groups' with sub-links for 'My Requests', 'Manage Users', 'Manage Rules', and 'Help'. The 'Ordering Rules' tab is active, and the search criteria are set to 'James'. A search button is visible. Below the search form, a table lists 4 users matching the criteria. The user 'JAMESHALL' is selected, and an 'Edit Ordering Rules' button is visible next to it.

Search for users to add or modify their ordering rules:

First Name:  A

Last Name:

Email:

User Name:

User Role:

Quick Tips:

- Click "Edit Ordering Rules" to create or modify ordering rules.
- Click the user name to view user details, rules and groups.

The following 4 users match the search criteria.

Select One User	USER ID	LAST NAME, FIRST NAME	EMAIL
<input type="radio"/>	JAMESNEW	New, James	jnew@quill.com
<input checked="" type="radio"/> <span>B</span>	JAMESHALL	Hall, James	jhall@quill.com
<input type="radio"/>	LINCOLNJ	Lincoln, James	jlincoln@quill.com
<input type="radio"/>	JIMSUPER	Super, James	jsuper@quill.com

C

From this screen, you can create or edit ordering rules for individuals.

- A Search for an existing user from your organization registered on Purchasing Manager by first name, last name, email, user name or user role. Then click 'Search'.
- B Your search results display in this area and from here you may select the user you wish to edit the ordering rules for. You may also click on the blue user name to view their information.
- C Click 'Edit Ordering Rules' to add or edit their ordering rules.

# Creating or Editing a User's Ordering Rules

Need Help | 1-800-982-3400 | Chat | Why Quill.com | Track Order

WELCOME, PLEASE SIGN IN My Account | My Deals

Fast Free Shipping. Order under \$25? See details

PRODUCTS | INK & TONER | COFFEE | SNACKS | CLEANING | SERVICES | SHOP BY INDUSTRY

Purchasing Manager: Manage Rules & Groups | My Requests | Manage Users | Manage Rules | Help

Ordering Rules | Approval Groups

Ordering Rules > View/Edit Ordering Rule

Add requesting rule(s) for: James Hall (JAMESHALL)

Does NOT require approval (can purchase directly)  
 Route ALL requests for approval  
 Requires approval by limit(s):

Maximum order total per request: \$ [ ]

Minimum order total per request: \$ [ ]

Maximum unit price per item: \$ 800

\*Route this user through an approval group:

Marketing Dept Approval Group

Clear Save

**A** Use the breadcrumb links if you need to go back a step. If you click 'Ordering Rules' it will take you back to the previous screen where you can search for users.

**B** All new Approvers will be defaulted with the first option: "Does NOT require approval (can purchase directly)."  
All new Requestors will be defaulted with the second option: "Route ALL requests for approval"

**C** If you apply rules to a user, you will be required to route the user through an approval group using the drop down option. The approval group will consist of at least one Approver and any member of the selected approval group can approve a request from this Requestor.

# Confirmation of Change to User's Rules

Add Users to Approval Group | View/Remove Members

Quick Tips: Click on user name to see user information.

**User Details**

First Name: Matt  
Last Name: Lincoln  
User Name: LINCOLN67  
Email: matt.lincoln67@quill.com  
Phone#: 847-946-5555  
Create Date: 2013-11-19

[View Order History](#)  
Viewing order history will take you out of Purchasing Manager.

**Authorized Billing Address(es)**

NORTHBROOK  
Quill Account# 667472  
KOENIG & STREY REAL LIVING R E  
1370 MEADOW RD  
NORTHBROOK, IL 60062

**Member of Approval Group(s)**

FOREVER 21 STORES - TIER 1  
ATTIAS APPROVAL GROUP

**Ordering Rules**

✔ Requires approval by limit(s): Maximum purchase amount: \$800.00

**Requestors**

The following requestors are routed through one of the approval groups displayed above. To reassign the group they are routed through, go to [Ordering Rules](#).

BARBARA DERSCH	ALLISON ROTH	KAREN DANNER
NICOLE RIZZO	CORRINE CARAHER	KATIE ECK
MARY ELLEN BURNS	DEBBIE TAPPER	PAT FERRIS
AMANDA AUSTIN	BECKY HAUSER	KIM MORINELLI
MELODY MAJEWSKI	CRYSTAL MCALLISTER	KATHY SCHULTZ
KRISTA PIPENHAGEN	DONNA STRZEMPA	LIZ MITCHELL
KELLY BRENNAN	EILEEN TOMSHECK	MEGAN TRUBICH
JUDY ARNOLD	JANIS OLSEN	

**A** After you create or edit a user's ordering rules, you will see this confirmation window. A green check mark means there was a recent change to that information.

If you close this window, you can always view this User Information by clicking on the blue user name.

# Creating an Approval Group

The screenshot shows the 'Create New Approval Group' form in the Quill.com Purchasing Manager. The form has two radio buttons: 'Search Approval Groups' (unselected) and 'Create New Approval Group' (selected). The 'Group Name' field contains 'FOREVER 21 STORES - TIER 1' and is marked with a blue circle 'A'. The 'Description' field is empty with the placeholder text 'Enter description...'. A blue 'Create' button is at the bottom. A 'Quick Tips' box on the right states: 'Approval groups allow you to assign multiple people to approve purchases to expedite the approval process.'

**A** With the option of 'Create New Approval Group' selected, you may create an approval group by any name and with any description you'd like. Click 'Create' and then create more groups or manage group members.

# Search for an Approval Group

The screenshot shows the search results for approval groups. The 'Search Approval Groups' radio button is selected. The 'Group Name' and 'Contains Member User Name' fields are empty. A blue circle 'A' is next to the 'Search' button. Below the search fields is a table of results:

GROUP NAME	# OF MEMBERS
ALISON	3
ANGERMAN APPROVAL GROUP	6
ATTIAS APPROVAL GROUP	22
ERICKSON APPROVAL GROUP	6
FOREVER 21 STORES - TIER 1	22
FOREVER 21 STORES - TIER 2	3
HAMBLET APPROVAL GROUP	6
HARRINGTON APPROVAL GROUP	22

To the right of the table is a list of actions: 'View/Remove Members', 'Add Users to Group', 'Edit Group Name/Description', 'Delete Group', and 'View Requestors'. A blue circle 'B' is next to the 'ATTIAS APPROVAL GROUP' row, and a blue circle 'C' is next to the 'Add Users to Group' button.

**A** Search for an approval group by Group Name or User Name, then click 'Search'.

**B** Once you find the Approval Group you are looking for, select it from this area and chose from the options to the right.

**C** Options on selected Approval Group are:

1. View/Remove Members of an Existing Approval Group
2. Add Existing Users to an Approval Group
3. Edit the Approval Group Name and/or Description
4. Delete the Approval Group
5. View the Requestors that are assigned to the selected Approval Group.

# Add to, View or Remove Existing Users from Approval Group

Need Help ▾ 1-800-982-3400 Chat Why Quill.com Track Order

Reorder Fast Order by Item # WELCOME, PLEASE SIGN IN My Account 0

Fast Free Shipping. Order under \$25? See details My Deals ▾

PRODUCTS ▾ INK & TONER ▾ COFFEE | SNACKS ▾ CLEANING ▾ SERVICES ▾ SHOP BY INDUSTRY ▾

Purchasing Manager: Manage Rules & Groups My Requests 3 | Manage Users | Manage Rules | Help

Ordering Rules Approval Groups

Approval Groups > Add Users to Approval Group

Add Users to Approval Group  View/Remove Members

Search for users to add to approval group:  
ATTIAS APPROVAL GROUP

First Name: Matt

Last Name:

Email:

User Name:

Search

Quick Tips:  
Click on user name to see user information.  
Select checkbox next to user name to add them as a member to this approval group.

Description:  
Approval group for tier 1 only with requestors with a max limit of \$2,000.

Add User(s) Add all 3 users

Select	USER NAME	LAST NAME, FIRST NAME	EMAIL
<input checked="" type="checkbox"/>	MATTB	Boyajian, Matt	matt.boyajian@quill.com
<input type="checkbox"/>	MATTLINCOLN12	Lincoln, Matt	matt.lincoln@quill.com
<input type="checkbox"/>	MPENTO	Pento, Matthew	matthew.pento@quill.com

**A** Select to add existing users to the selected Approval Group or view or remove Approval Group members.

**B** When you first arrive at this page, all users associated with your account number will appear below. This search feature acts as a way to filter through the users.

Search from users that are already in your Purchasing Manager account but are not assigned to this particular Approval Group.

**C** Select as many users you would like to add to this Approval Group and click 'Add User(s)'.

**D** Similar to adding existing Purchasing Manager users to an Approval Group, from this screen you may remove as many members from this Approval Group and click 'Remove Member(s)'.

Ordering Rules Approval Groups

Approval Groups > View/Remove Members

Add Users to Approval Group  View/Remove Members

Search for group members in approval group:  
FOREVER 21 STORES - TIER 1

First Name: Matt

Last Name:

Email:

User Name:

Search

Quick Tips:  
Click on user name to see user information.  
Select checkbox next to member user name to remove them from this approval group.

Description:  
Approval group for tier 1 only with requestors with a max limit of \$2,000.

Remove Member(s) Remove all 3 members

Select	USER NAME	LAST NAME, FIRST NAME	EMAIL
<input type="checkbox"/>	JAMESHALL	Hall, James	jhall@quill.com
<input checked="" type="checkbox"/>	LINCOLN67	Lincoln, Matt	mlincoln@quill.com
<input type="checkbox"/>	MSUPER	Super, Matt	msuper@quill.com