

**1** Manager logs into catalog and goes under Account Info > Users > Manage Users or Add Users. Under Manage Users, they find the user and click on Edit or they go to Add User and simply set up a new user with spending limits.

**MANAGE USER LOGINS** [Add User Logins](#)

Group By:  Search:  All Results per page: 50

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Showing 1 - 4 of 4 results Page: 1

Name	Company	Email	Phone	Actions
Barbara Azcuy Username: 305300	Promo/World Emblem	bazcuy@worldemblem.com	305-899-9006	<a href="#">Edit</a>   <a href="#">Password</a>   <a href="#">Disable</a>
Manuel Figueroa Username: mfigueroa	Promo/World Emblem	mfigueroa@worldemblem.com	800-766-0448	<a href="#">Edit</a>   <a href="#">Password</a>   <a href="#">Disable</a>
Erin Gallagher Username: egallagher	Promo/World Emblem	egallagher@worldemblem.com	305-899-9006	<a href="#">Edit</a>   <a href="#">Password</a>   <a href="#">Disable</a>
Andres Miquilena Username: amiquilena	Promo/World Emblem	amiquilena@worldemblem.com	800-766-0448	<a href="#">Edit</a>   <a href="#">Password</a>   <a href="#">Disable</a>

**2** Under Order Approval Information, toggle Yes. Then set up either a Single Order Limit, Monthly Order Limit or both. When these limits are exceeded by the Purchaser, the system will only let the Purchaser save the orders as Pending. A Manager will then need to log into the catalog and Approve/Submit the orders to production. The user must also be set up with a Purchaser role for these limits to be set.

**EDIT USER INFORMATION: MFIGUEROA**

**General Information**

First Name\*   
 Last Name\*   
 Company Name\*   
 Phone (111-111-1111)   
 Fax (111-111-1111)   
 Mobile (111-111-1111)   
 Email\*   
 Send New User Email Confirmation  Send  Do Not Send  
 Default Shipping Address



**Order Approval Information**

Require Order Approval  Yes  No  
 Single Order Limit (\$)  (\$500.00)  
 Monthly Order Limit (\$)  (\$0.00)

**User Roles**

Available:   
  
 Selected:

**3** When the Purchaser logs into their catalog and submits an order, the system will check their order limits. If the Purchaser exceeds the single or monthly order limit, the system will only allow the Purchaser to save the order as Pending. Then the Purchaser will receive an email with the order details. The Purchaser needs to forward that email to the appropriate Manager so they can log into the system and Approve/Submit the order.

Qty	Description	Unit Price	Price	Remove from Cart
1000	 <b>AMERICAN FLAG 2.5 X 3.5 59-7</b> American Flag 2.5 X 3.5 59-7 Embroid. Patch Finished Goods Product Type: Stock Emblems - Flags Design Id:110701   SKUs:100001701110701 Expected Ship Date: 5/21/2010	\$0.94 <a href="#">Qty Pricing</a>	\$940.00	

Update Cart Empty Cart

Sub Total \$940.00  
 Coupon \$0.00  
**Grand Total \$940.00**

**Order Info**

Shipping Methods    
 Coupon   
 Comments:

**Payment Info**

Client Terms  
 Terms 05 - Net 30  
 PO #

**Spending Limit Reached**

You have reached your current spending limit. Please review your order.

**Place Order**

Don't Place Order Now, Save As Pending Nickname =

**4** The Manager will receive an email from the Purchaser notifying them that an order is Pending. Then the Manager must log into the catalog and go under Waiting On Approval > Pending Orders. All Pending Orders will be displayed with their status. Click on Edit/Approve to open the order and then simply click on Submit to send the order to production.

**PENDING ORDERS WAITING ON APPROVAL** [Back](#)

Create Date:  to   
 Search:  All Results per page: 50  
[Save Search](#) [Download](#) [View Saved Searches](#)

Showing 1 - 4 of 4 results Pages: 1

Date	Nick Name	Customer / User	Account	Amount	Email	Actions
6/3/2010	TEST-ERIN	mfigueroa	Promo/World Emblem	\$940.00	Sent	<a href="#">View / Edit</a>   <a href="#">Delete</a>   <a href="#">Resend Email</a>
5/17/2010	TEST	mfigueroa	Promo/World Emblem	\$940.00	Sent	<a href="#">View / Edit</a>   <a href="#">Delete</a>   <a href="#">Resend Email</a>
5/12/2010	ANDRE	amiquilena	Promo/World Emblem	\$1,307.00	Sent	<a href="#">Delete</a>   <a href="#">Resend Email</a>
4/29/2010	amiquilena	amiquilena	Promo/World Emblem	\$278.00	Sent	<a href="#">Delete</a>   <a href="#">Resend Email</a>