



Online Store

**General Store Front
User Guide**

May 2019

shop.atlasmcneil.com.au

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Introduction

This User Guide covers the various tasks that can be completed if you have been assigned the **Customer Account Admin User role** for the Atlas McNeil Online Store Front.

This role allows you to establish, maintain and remove Users within your business and manage the orders that are placed by a User granted approval.

IMPORTANT:

Ideally this role be assigned to an employee within your business with a good understanding of who is ordering on behalf of their business unit, establishing departmental budgets and/or spend limits, and whether approval of products within shopping basket is necessary prior to creating and placing an order.

1 User Roles and Permissions within Online Store

The Atlas McNeil Online Store allows a User to be assigned one or more User role(s).

The level of access varies per User role assigned, which in turn dictates what tasks they will be able to perform within the Online Store.

The five roles available to assign a User are:

Role	BUYER	CONTRACTOR	ACCOUNTS PAYABLE	APPROVER (Authorisor)	CUSTOMER ACCOUNT ADMIN
Access	Purchasing through authorization workflow	Unable to view pricing of a product	Access to manage invoices across multiple accounts	Approve and release shopping cart	Manage User(s)
View Products	✓	✓	✓	✓	✓
Place Orders	✓	✓	✓	✓	✓
Update their User details	✓	✓	✓	✓	✓
Non-display of pricing	✓	✗	✓	✓	✓
Approve Orders placed by another User who has a spend limit set on their account			✗	✓	✓
View all Invoices			✓	✓	✓
Pay Invoices by Credit Card			✓	✓	✓
Assign Ship-to Address Location					✓
Create, maintain and remove a User					✓
Setup spend limit and/or Budget					✓

User Role	Description of tasks assigned to this User role
Buyer	Allows a User to view products, place orders, update their own details.
Contractor	Provides the same access as the Buyer role, however, the Contractor is unable to see any details of pricing throughout the Online Store. This role is designed to assign to your sub-contractors.
Accounts Payable	Allows a User to view and pay invoices across multiple customer accounts and Ship-to Address locations Note: The User requires customer account(s) and Ship-to(s) address locations linked in the Back Office
Approver	Provides the same access as the Buyer role, as well as: <ul style="list-style-type: none"> • Approve products submitted in a shopping cart for other Users Note: this will only occur if a User has a buying limit set on their account • View all User Invoices • Pay for your Invoices by credit card Note: Selecting the Approver User role, will automatically select the Buyer role
Customer Account Admin	Provides the same access as the Approver role, as well as perform the following tasks to manage their User(s): <ul style="list-style-type: none"> • Manage what locations (Ship-to(s)) address a User can order on behalf of • Determine what level of access a User(s) have on the Online Store • Create, maintain and remove a User(s) • Setup User spend limits and budgets Note: Selecting the Customer Account Admin User role, will automatically assign the Approver and Buyer User roles

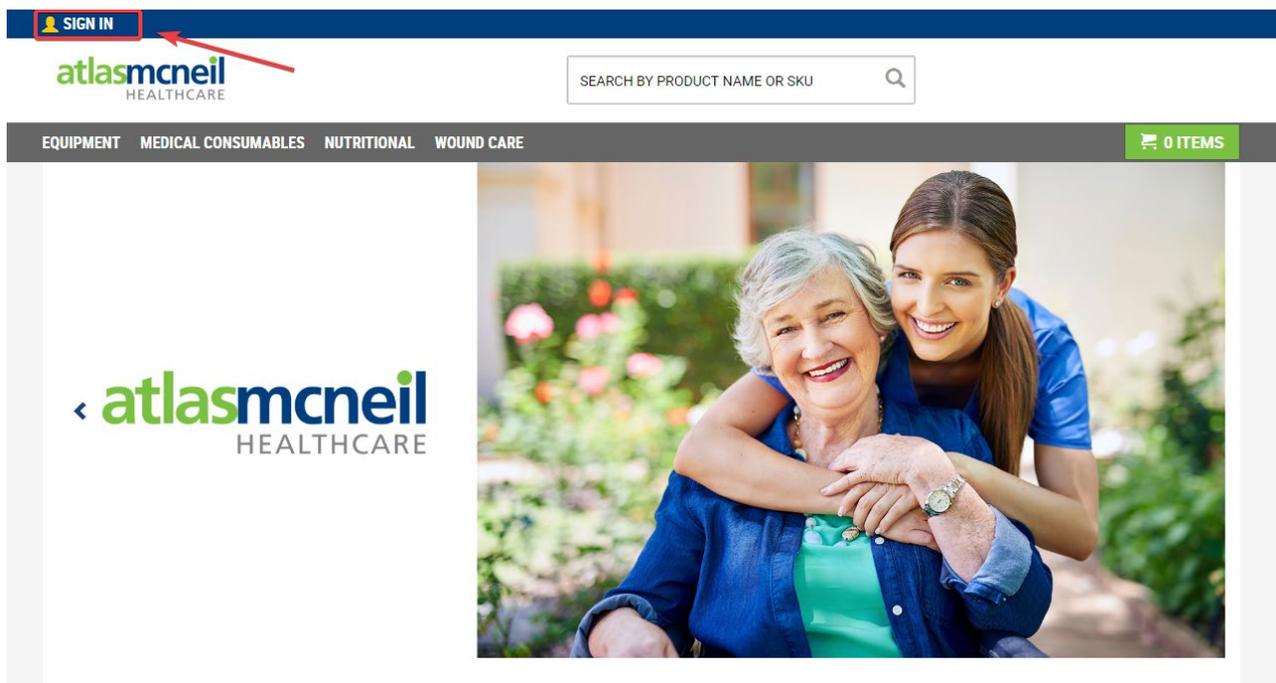
2 'My Account' Overview

Each User role within the Atlas McNeil Online Store, will have access to **My Account** dashboard, which allows the User to view their personal details, Order Management, My Orders, Order History and My Lists (i.e. Favourites).

Approver and Customer Account Admin User roles will additionally be able to approve their User(s) orders and view and pay Invoices. As a Customer Account Admin User, you are also able to maintain the Users for the business.

Accessing 'My Account' dashboard

1. Go to <https://shopatlasmcneil.com.au/>
2. Click  icon in the top left-hand corner of the page:



3. Enter your **Email** (Login) and **Password**, then click the **SIGN IN** button.

Email

Password

8 characters minimum, must include 2 numbers and no spaces.

Remember **select this to remember login credentials**

[Forgot your password?](#)

SIGN IN

3.1 Forgot Your Password

IMPORTANT: Use the **Forgot your password?** icon if in doubt.

This action will request you input your email address, first name and last name.

SIGN IN | REGISTER

BUNZL

SEARCH BY PRODUCT NAME OR SKU

CLEANING HEALTHCARE HOSPITALITY WORKPLACE SAFETY

0 ITEMS

HOME / FORGOT PASSWORD STEP 1

FORGOT YOUR PASSWORD?

For security purposes, please provide your email address, first and last name. You will then be asked to answer the security question you provided during registration. If you answer the question successfully we will send you an email with a link. Follow this link to create a new password. If you have any problems or need help, please contact our Customer Service.

STEP 1 OF 2

Email Address

First Name

Last Name

NEXT

Then click **NEXT**.

4. Once Signed In, a pop up window will display, asking you to **Select Ship To:***.

Clicking within the **Please Select** field, under the **Select Ship To:***, will display a dropdown list of Ship-to Address Location(s) you are assigned.

Example:

5. Select **Ship-to Address Location**, to work within, then click **CONTINUE**.

Note: Information displayed within the [HOME / MY ACCOUNT](#) overview will be relevant to the Ship-to Address Location selected.

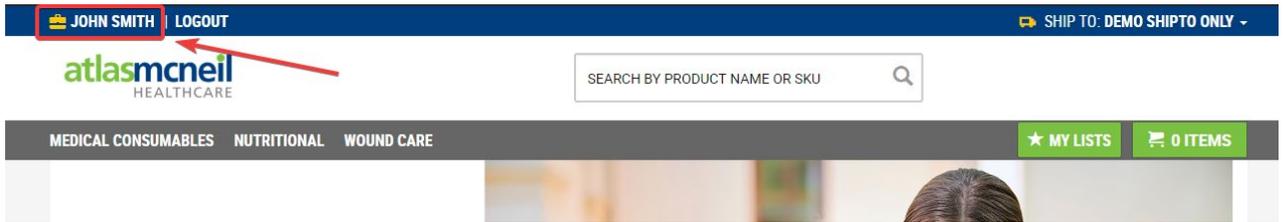


If the User is assigned to one Ship-to Address Location, the User will be taken straight to the Atlas McNeil Store Home Page.

6. You will now have the Atlas McNeil Online Store Home Page displayed.

In the top left-hand corner, the **SIGN IN** icon will now be replaced with the User first and last name **JOHN SMITH**, to represent the User successfully logged into User account.

Click on **JOHN SMITH** (your Username) to view [HOME / MY ACCOUNT](#) details:



The **My Account Dashboard** will now be displayed.

HOME / MY ACCOUNT / OVERVIEW

Smith, John
SOUTHERN CROSS CARE
Account Admin

Logout

- Order Management
- Approval History
- Rejected Orders
- Invoices
- My Orders
- My Pending Orders
- My Lists
- Order History
- All Order History
- Account Information
- My Profile
- Addresses
- User Management

Welcome Back John Smith

You have 25 overdue invoices with \$ 18,526.06 outstanding [VIEW ALL](#)

ORDER MANAGEMENT

0

PENDING APPROVAL
TOTAL \$ 0.00 PENDING

🕒

APPROVAL HISTORY

\$

INVOICES \$ 447,211.76
OWING

📊

CREDIT \$ 140,600.20
REMAINING

MY ORDERS

0

PENDING

0

APPROVED

0

REJECTED

2.1 My Account Dashboard

On the right-hand side of the page is the dashboard area of [HOME / MY ACCOUNT](#).

This enables you to quickly access and view key areas of [HOME / MY ACCOUNT](#), including key actions and information.

Welcome Back John Smith

You have 25 overdue invoices with \$ 18,526.06 outstanding [VIEW ALL](#)

ORDER MANAGEMENT

0

PENDING APPROVAL
TOTAL \$ 0.00 PENDING

🕒

APPROVAL HISTORY

\$

INVOICES \$ 447,211.76
OWING

📊

CREDIT \$ 140,600.20
REMAINING

MY ORDERS

0

PENDING

0

APPROVED

0

REJECTED

MY LISTS

Currently you don't have any lists.

IMPORTANT: Depending on role assigned to the User, will determine what is displayed and available to access.

Smith, John

Account Admin

Smith, John

Approver, Accounts Payable, Buyer, Account Admin

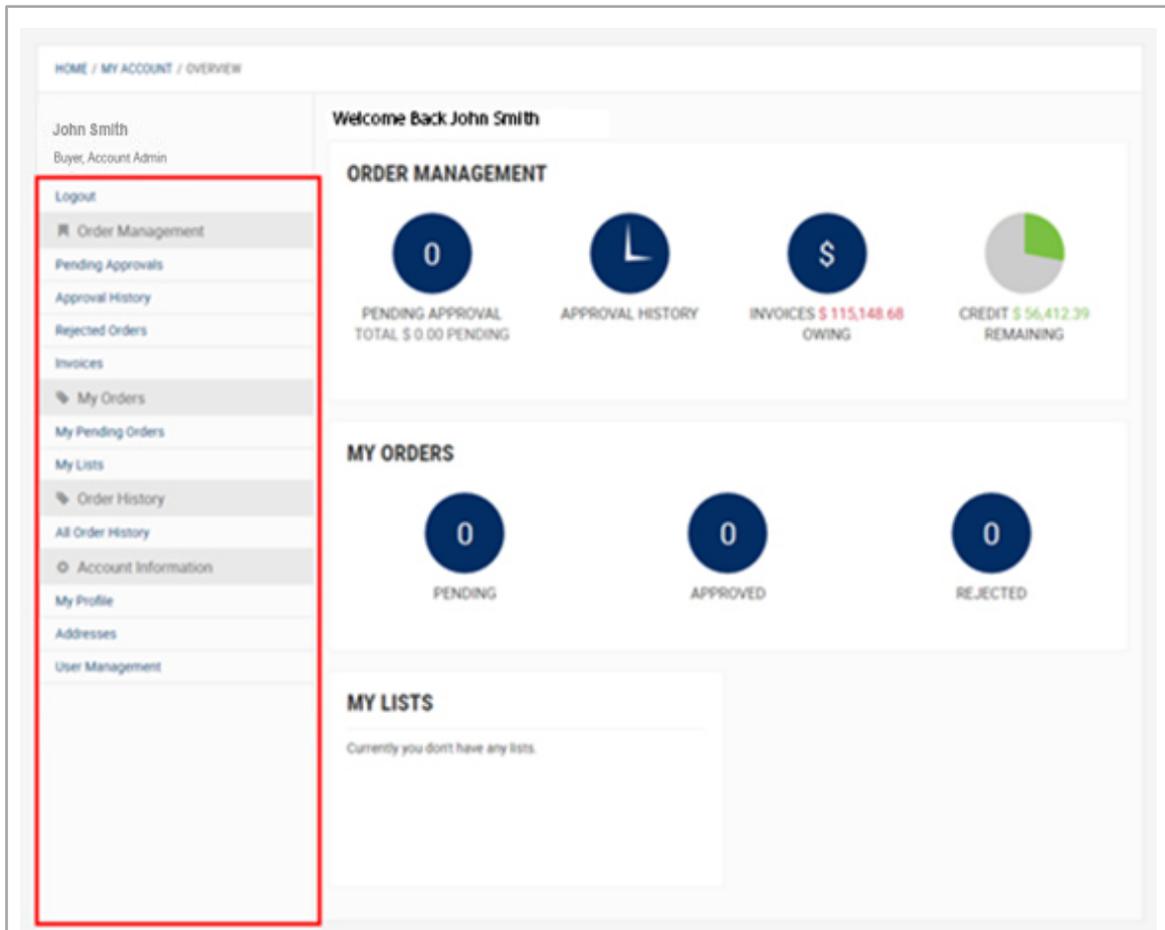
The Dashboard includes:

Order Management (This section is only visible to Approvers and Customer Account Admin User roles)		
Icon	Sub-Menu Label	Description
 13 PENDING APPROVAL TOTAL \$ 12,361.33 PENDING	Pending Approval	Display the total \$0.00 pending - amount for orders requiring approval for Ship-to Address Location. The button itself will also highlight the number of orders waiting approval.
 APPROVAL HISTORY	Approval History	Allows the User to quickly and easily view the orders approved for Ship-to Address Location.
 INVOICES \$ 196,242.87 OWING	Invoices Owing	Display total \$ amount value of unpaid invoices for Ship-to Address Location.
 CREDIT \$ 194,065.35 REMAINING	Credit Remaining	Display the \$ credit limit remaining for your business to spend for the period.
My Orders		
Icon	Sub-Menu Label	Description
 0 PENDING	Pending	Displays an order in progress and not yet submitted.
 0 APPROVED	Approved	Displays the User order(s) approved.
 0 REJECTED	Rejected	Displays the User order(s) rejected.
My Lists		
This will detail any List attached to a User (also known as favourites). This could include an Imprest List, and/or a List created by the User.		

2.2 My Account Navigation Menu

On the left-hand side of [HOME / MY ACCOUNT](#) displays a navigation menu.

This enables the User to easily access various areas of the Online Store by clicking on the Sub-Menu label and being directed via a link to the respective area.



Menu	Sub-Menu Label	Description
Logout		allows you to logout of your My Account
Order Management Visible to Approver and Customer Account Admin User Roles	Pending Approvals	view an Order(s) awaiting approval
	Approval History	view Orders that have been approved
	Rejected Orders	view Orders rejected
	Invoices	view all Invoices for selected Ship-to Address Location
My Orders	My Pending Orders	view pending order(s) yet to be submitted
	My Lists	view lists (Favourites, Imprest)
Order History	All Order History	view all Orders submitted by all Users linked to this User
Account Information	My Profile	view and update User details
	Addresses	view all Ship-to Address Location
Visible to Customer Account Admin User Role	User Management	view and maintain all Users under that profile

3 Create, Maintain and Remove a User

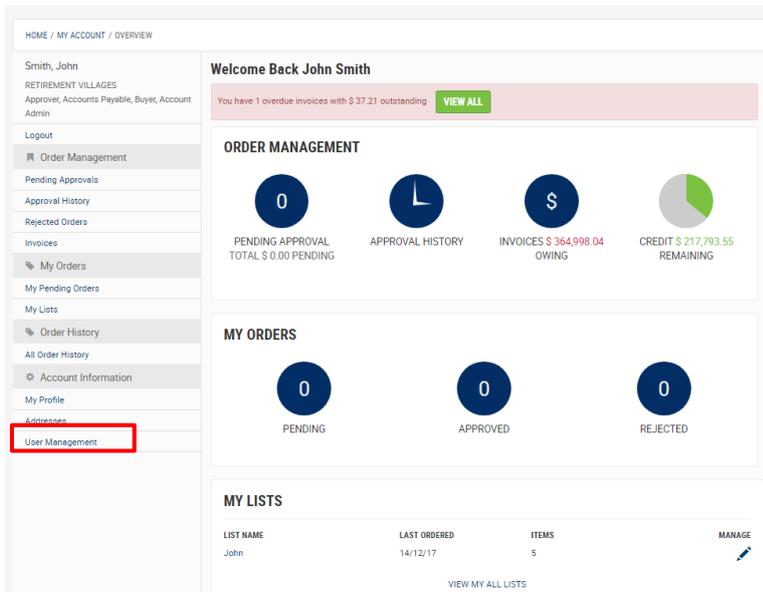
Role	BUYER	CONTRACTOR	Accounts Payable	APPROVER (Authorisor)	Customer Account Admin
Access		Unable to view pricing of a product		Approve and release shopping cart	Manage User(s)
View Products	✓	✓	✓	✓	✓
Place Orders	✓	✓	✓	✓	✓
Update their User details	✓	✓	✓	✓	✓
Non-display of pricing	✓	✗	✓	✓	✓
Approve Orders placed by another User who has a spend limit set on their account			✗	✓	✓
View all Invoices			✓	✓	✓
Pay Invoices by Credit Card			✓	✓	✓
Assign Ship-to Address Location					✓
Create, maintain and remove a User					✓
Setup spend limit and/or Budget					✓

A User assigned a Customer Account Admin role is granted permission to:

 Customer Account Admin Role	<ul style="list-style-type: none"> • Create a new User(s) a log on to access the Atlas McNeil Online Store These Users can then place orders for the Ship-to Address Location(s) assigned to their User profile • Manage what Ship-to Address Location(s) a User can order on behalf of • Determine what level of access a User(s) have within Online Store • Create, maintain and remove a User(s) • Setup User spend limits and budgets <p>Note: Selecting the Customer Account Admin User role, will automatically assign the Approver and Buyer User role functionality.</p>
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3.1 Adding a new User

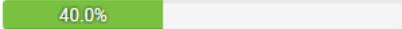
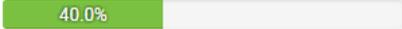
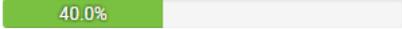
1.  to Atlas McNeil Online Store using Customer Account Admin User access.
2. Select **Select Ship To:***.
3. Click .
HOME / MY ACCOUNT dashboard details will display.
4. Select **User Management** within the  navigation menu.





There may already be a User(s) assigned – each User will display, and include information on each User.

The table to follow is an example only.

Karen Davidson	Order limit \$ 500.00 Budget (weekly) \$ 10,000.00 	Active	0 order(s)	Approver Buyer Account Admin	 
Kathryn Cooper	Order limit \$ 500.00 Budget (weekly) \$ 10,000.00 	Active	0 order(s)	Buyer	 
Katrina Rennie	Order limit \$ 500.00 Budget (weekly) \$ 10,000.00 	Active	0 order(s)	Buyer	 
Keith Khoo	Order limit Unlimited No budget defined.	Active	0 order(s)	Contractor	 
Keith Khoo	Order limit Unlimited No budget defined.	Active	0 order(s)	Account Admin	 
Kellie Nielson	Order limit \$ 500.00 Budget (weekly) \$ 10,000.00 	Active	0 order(s)	Buyer	 

5. Click the ADD USER icon:

USERS ADD USER

BUDGET	STATUS	PENDING ORDERS	ROLE(S)
AMBuyer maddaford Order limit \$ 500.00 Budget (quarterly) \$ 2,000.00 0.0%	Active	0 order(s)	Approver Buyer Account Admin
Alana Maddaford Order limit No threshold. No budget limit.	Active	0 order(s)	Approver Accounts Payable Buyer Account Admin
Belinda smith Order limit Unlimited No budget defined.	Active	0 order(s)	Account Admin
Dan Bar Order limit Unlimited Budget (weekly) \$ 500.00 0.0%	Active	0 order(s)	Buyer
Donald Duck Order limit Unlimited No budget defined.	Inactive	0 order(s)	Account Admin
Emily Lucas Order limit Unlimited No budget defined.	Active	0 order(s)	Approver Buyer Account Admin
Glenn Barry Order limit Unlimited No budget defined.	Active	0 order(s)	Account Admin

The User will be prompted with an Online Form to complete.

6. Complete all fields contained within the form.

CREATE NEW USER

* REQUIRED FIELD

Title	<input type="text" value="Select Title"/>	
First Name *	<input type="text"/>	
Last Name *	<input type="text"/>	
Login/Email *	<input type="text"/>	
Login/Email Confirmation *	<input type="text"/>	
	<input checked="" type="checkbox"/> Active	
Phone *	<input type="text"/>	
	<small>Your phone number must consist of numbers.</small>	
Ship Tos *	<input type="text" value="2000000-024, MAINSTREAM"/> <input type="text" value="2000000-025, GOODWIN"/> <input type="text" value="2000000-027, SERVICES"/> <input type="text" value="2000000-028, CUTLER"/>	
Role(s) *	<input type="checkbox"/> Contractor <input type="checkbox"/> Accounts Payable <input type="checkbox"/> Account Admin <input type="checkbox"/> Approver <input type="checkbox"/> Buyer	
Permission(s):	<input type="checkbox"/> All Orders Require Approval	
Order Limit:	<input type="text" value="AUD"/>	
Budget:	<input type="text" value="AUD"/>	<input type="text" value="weekly"/>

IMPORTANT: Phone field – do not include any space between numbers

7. Click the  icon after entering information.

The User has been created and active.

IMPORTANT: Ensure the User is assigned the relevant Ship-to Address Location(s).



A User **must have** at least one Ship-to Address Location assigned.

4 Assign, Manage and Remove Ship-to Address Location(s) to User

A User assigned a Customer Account Admin role is granted permission to manage Ship-to Address Location(s) assigned to a User that falls under their User profile.

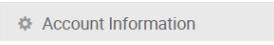
If the Customer Account Admin User role has access to a list of Ship-to Address Location(s), these Ship-to Address Location(s) can be assigned to a User under this User Profile.

IMPORTANT: Any User assigned Ship-to Address Location(s), can place orders for that Ship-to Address Location.

4.1 Assign Ship-to Address Location(s)

1.  to Atlas McNeil Online Store.
2. Select . This will take you to the Home page of the Online Store.
3. Click .

 dashboard details will display.

4. Select **User Management** within the  navigation menu.

This will direct you to the **USERS** page where a list of all Users displays with links to manage each.

5. Click  icon to the right, to edit the User.
6. The **USER DETAILS** page will display.

USER DETAILS

PROFILE ✎

Name: Mr. Dan Bar
 Email: dan.bar@bunzl.com.au
 Phone: 0432555555

ROLE & BUDGET LIMITS ✎

Role(s): Buyer
 Permission(s): Manage Purchases
 View cost objects
 Order Limit: Unlimited
 Budget (weekly): \$ 500.00

SHIP TO ADDRESSES ASSIGN NEW UNASSIGN

Listed below are the ship to addresses that have been assigned to the user. Click the "Assign New" button to assign a new ship to address to the user.

<input type="checkbox"/>	SHIP-TO SEQ	ADDRESS
<input type="checkbox"/>	2000000-001	BRUCE Australian Capital Territory 2617

Scroll down the page to view **SHIP TO ADDRESSES** section, detailing a list of assigned **SHIP-TO ADDRESSES** for that User.

- To assign a new **Ship-to Address Location**, click **ASSIGN NEW**.
 The **SHIP TO ADDRESSES** page will display.

SHIP TO ADDRESSES ASSIGN NEW UNASSIGN

Listed below are the ship to addresses that have been assigned to the user. Click the "Assign New" button to assign a new ship to address to the user.

<input type="checkbox"/>	SHIP-TO SEQ	ADDRESS
<input type="checkbox"/>	2005839-001	Demo Account, 1 Main St
<input type="checkbox"/>	2005839-018	Demo Account, 1 Main St
<input type="checkbox"/>	3006542-002	Demo Account, 1 Main St
<input type="checkbox"/>	3006542-003	Demo Account, 1 Main St

If there is an extensive list of Ship-to Address Locations, enter the Ship-to Seq in the available field, and click search.

IMPORTANT: Account Number and Ship-to Address Location must be used to search

0000000-000

- All Ship-to Address Locations attached to the Customer Account Admin role will be listed, that have not yet been assigned to the User.
- Check the checkbox against each Ship-to Address Location(s) to be assigned to the User.

SHIP TO ADDRESSES

Use the checkboxes and click "Assign" to assign ship to user.

Ship-to Seq



SHIP TO ADDRESSES

ASSIGN

CANCEL

Select from the ship to addresses below and click 'Assign' to add addresses to the user.

<input type="checkbox"/>	SHIP-TO SEQ	ADDRESS
<input type="checkbox"/>	2000134-025	Demo Account, 1 Main St
<input type="checkbox"/>	2000134-027	Demo Account, 1 Main St 2
<input type="checkbox"/>	2000134-028	Demo Account, 1 Main St
<input type="checkbox"/>	2000134-029	Demo Account, 1 Main St

10. Click **ASSIGN**.

Checked Ship-to Address Location(s) NOW assigned to the User.

4.2 Unassign Ship-to Address Location(s)

Repeat Steps 1 to 6 as per Assign Ship-to Address Location(s) process.

7. The **USER DETAILS** page will display.
8. **Check** checkbox for those Ship-to Address Location(s) requiring unassignment.
9. Click **UNASSIGN**.

SHIP TO ADDRESSES

ASSIGN NEW UNASSIGN

Listed below are the ship to addresses that have been assigned to the user. Click the "Assign New" button to assign a new ship to address to the user.

<input type="checkbox"/>	SHIP-TO SEQ	ADDRESS
<input type="checkbox"/>	2005839-001	Demo Account, 1 Main St
<input type="checkbox"/>	2005839-018	Demo Account, 1 Main St
<input type="checkbox"/>	3006542-002	Demo Account, 1 Main St
<input type="checkbox"/>	3006542-003	Demo Account, 1 Main St

The Ship-to Address Location(s) unassigned, will now be available under **ASSIGN NEW**, to reassign if required.

5 Establish and Maintain Order Limit (Spend) / Budget for a User

A User assigned a Customer Account Admin role is granted permission to set budget limits to a User(s) falling under their profile.

This budget function is used when there is a need to manage individual spending, as well as contain total spending within the business. If setting a budget, the option of weekly, monthly or quarterly can be applied.

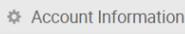
To set an Order Limit and/or Budget to a User, access User Management.

IMPORTANT: Any User assigned Ship-to Address Location(s), can place orders for that Ship-to Address Location.

5.1 Setting Order Limit and/or Budget limit

1.  to Atlas McNeil Online Store.
2. Select **Select Ship To:***. This will take you to the Home page of the Online Store.
3. Click .

HOME / MY ACCOUNT dashboard details will display.

4. Select **User Management** within the  navigation menu.

This will direct you to the **USERS** page where a list of all **Users** displays, with links to manage each.

USERS					ADD USER
	BUDGET	STATUS	PENDING ORDERS	ROLE(S)	
AMBuyer maddaford	Order limit \$ 500.00 Budget (quarterly) \$ 2,000.00 0.0%	Active	0 order(s)	Approver Buyer Account Admin	 
Alana Maddaford	Order limit No threshold. No budget limit.	Active	0 order(s)	Approver Accounts Payable Buyer Account Admin	 
Belinda smith	Order limit Unlimited No budget defined.	Active	0 order(s)	Account Admin	 

5. Click  icon to the right, to edit the User.

The **USER DETAILS** page will display.

USER DETAILS

PROFILE

Name: Alana Maddaford
Email: alana.maddaford@bunzl.com.au

ROLE & BUDGET LIMITS

Role(s): Approver, Accounts Payable, Buyer, Account Admin
Permission(s): Approve Pending Orders
Manage Purchases
Manage Users
Pay Invoices
Show Invoices
View cost objects
Approval Notification: Disabled
Order Limit: No threshold.
Budget: No budget limit.

6. Click  within the **ROLE & BUDGET LIMITS** section.

This will direct you to the **EDIT USER ROLE AND BUDGET LIMITS** page.

EDIT USER ROLE AND BUDGET LIMITS - ALANA MADDAFORD

Role(s): Contractor
 Accounts Payable
 Account Admin
 Approver
 Buyer

Permission(s): Approve Pending Orders
 Manage Purchases
 Manage Users
 Pay Invoices
 Show Invoices
 View cost objects

Disable Order Approval Notification Email
 All Orders Require Approval

Order Limit: AUD

Budget: AUD weekly

SAVE CHANGES **CANCEL**

IMPORTANT:

<input checked="" type="checkbox"/> All Orders Require Approval	
<input checked="" type="checkbox"/>	If this checkbox is ticked, then every order submitted by the User, will require the Customer Account Admin approval.
	 Approval required The User will view this message when reviewing their order information.
	<input checked="" type="checkbox"/> Disable Order Approval Notification Email If the Approver does not wish to receive notification email that an order is awaiting approval, this checkbox can be ticked.
<input type="checkbox"/>	If this checkbox is not selected, no order submitted will require approval.  Unchecking this box will disable the Order Limit and Budget functionality.

When the **checkbox is checked**, the Order Limit and Budget functionality fields will grey out.

Order Limit:

Budget:

All Orders Require Approval

Caution: If not all orders require approval, then ensure the **All Orders Require Approval** checkbox is not ticked. This will enable the Order Limit and Budget functionality.

The User placing the order will have an indicator  **Approval required** when reviewing their order information.

 MY CART

 CHECKOUT

 RECEIPT

REVIEW YOUR ORDER INFORMATION

 **Approval required** [Details](#)

Review your order details below and click "Submit Order" to complete your purchase. To change your order click "Return to Cart".

5.1.1 Set an Order Limit

7. Enter a value within the **Order Limit** field.

This will mean, any order placed by the User that is equal to this value or higher, will require Customer Account Admin approval.

5.1.2 Set a Budget

8. Enter a value into the **Budget** field.
9. Select the period from the dropdown field.

You can set an order limit for a **weekly, monthly or quarterly budget** period.

The value entered, will mean that all orders for the User will need approval once the total value of an order for the budget period has been reached.



Weekly budgets are for the period: Monday to Sunday

Monthly budgets are for the period: First day of the month to last day of the month

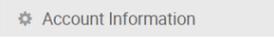
10. Click **SAVE CHANGES**.

6 Update a User Role

A User assigned the Customer Account Admin role is granted permission to assign or change the role assigned to a User(s) falling under their profile.

There are five roles that can be assigned to a User:

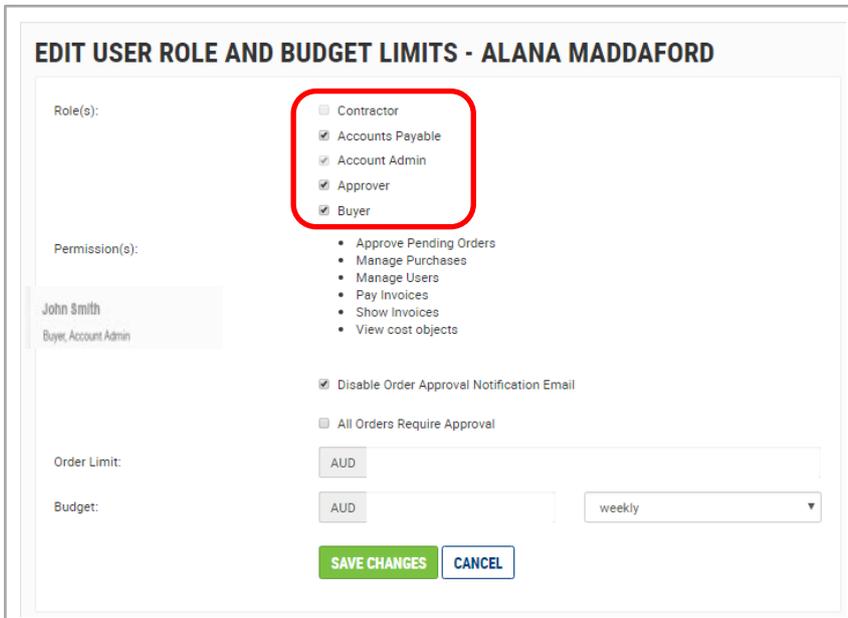
Buyer, Account Admin, Approver, Contractor and Accounts Payable

1.  to Atlas McNeil Online Store.
2. Select **Select Ship To:***. This will take you to the Home page of the Online Store.
3. Click .
4. **HOME / MY ACCOUNT** dashboard details will display.
5. Select **User Management** within the  navigation menu.

This will direct you to the **USERS** page where a list of all **User(s)** displays, with links to manage each.

6. Click  icon to the right, to edit the relevant User.

The **USER DETAILS** page will display.



7. Click  within the **ROLE & BUDGET LIMITS** section.

This will direct you to the **EDIT USER ROLE AND BUDGET LIMITS** page.

 Understand the role you are assigning the User.

8. Check or Uncheck the respective checkbox against each User role.

Role	Check box	Permission	Automatic Role Dependency
Contractor	<input checked="" type="checkbox"/>	Manage Purchases	No other role can be selected
Buyer	<input checked="" type="checkbox"/>	Manage Purchases View cost objects	You can select Approver with this role
Accounts Payable	<input checked="" type="checkbox"/>	Manage Purchases Pay Invoices Show Invoices View cost objects	Buyer Role will automatically select
Approver	<input checked="" type="checkbox"/>	Approve Pending Orders Manage Purchases Pay Invoices Show Invoices View cost objects	Buyer Role will automatically select
Account Admin	<input checked="" type="checkbox"/>	Approve Pending Orders Manage Purchases Manage Users Pay Invoices Show Invoices View cost objects	Buyer Role and Approver role will automatically select



By default, all Users have the Buyer role assigned to them.

To provide additional permissions to the User, select the checkbox next to either Approver or Account Admin as required, and this will list the permissions related to selected role.

9. Click **SAVE CHANGES**.

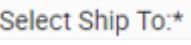
This will immediately update the permissions related to the role for the selected User.

7 Deactivating a User

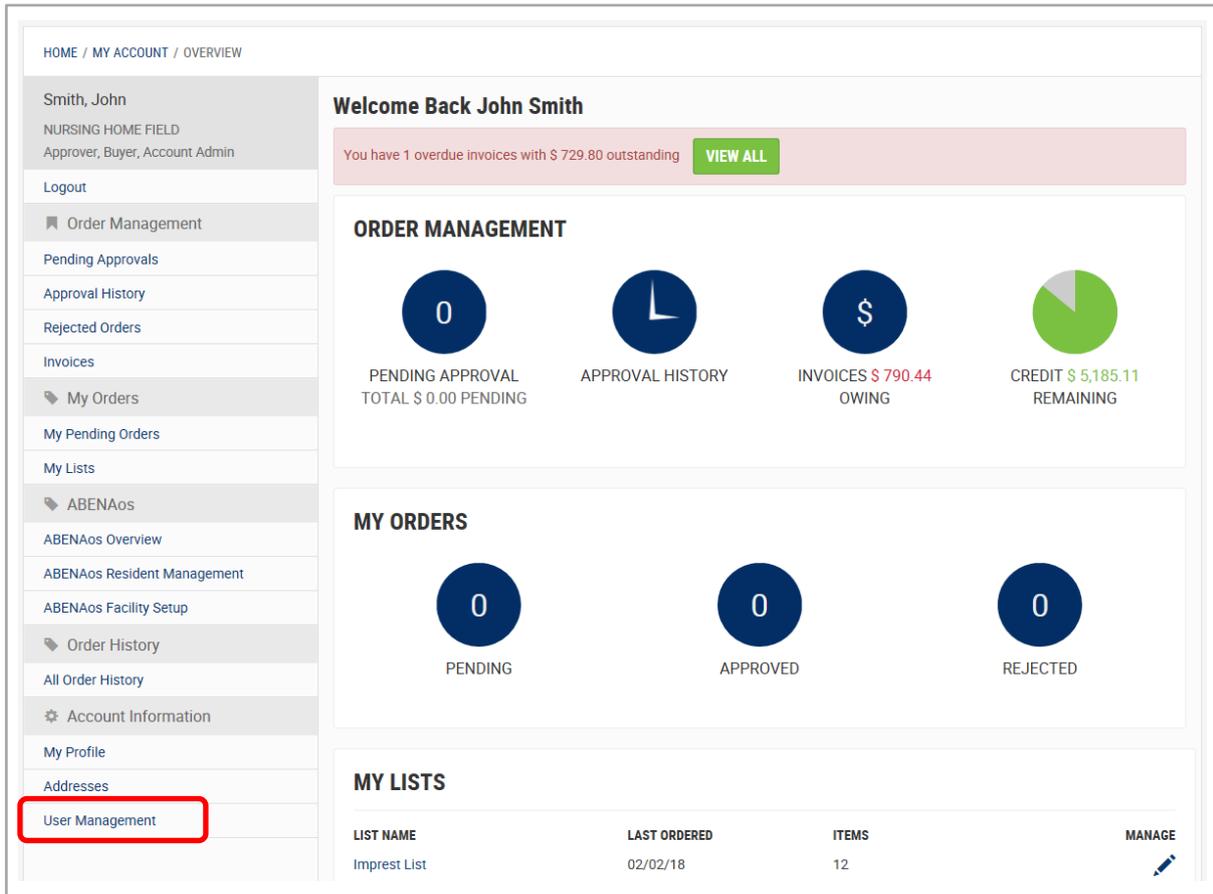
A User assigned the Customer Account Admin role is granted permission to deactivate a User(s) falling under their profile.

Deactivation of a User prevents login to the Online Store.

To deactivate a User, follow the instructions below.

1.  to Atlas McNeil Online Store.
2. Select  .
This will take you to the Home page of the Online Store.
3. Click  to access account information.
 dashboard details will display.

4. Select **User Management** within the  Account Information navigation menu.



The screenshot shows a user dashboard for John Smith. The left navigation menu includes: HOME / MY ACCOUNT / OVERVIEW, Smith, John (NURSING HOME FIELD, Approver, Buyer, Account Admin), Logout, Order Management, Pending Approvals, Approval History, Rejected Orders, Invoices, My Orders, My Pending Orders, My Lists, ABENAos, ABENAos Overview, ABENAos Resident Management, ABENAos Facility Setup, Order History, All Order History, Account Information, My Profile, Addresses, and **User Management** (highlighted with a red box). The main content area shows a welcome message, a notification for 1 overdue invoice, and sections for ORDER MANAGEMENT (Pending Approval, Approval History, Invoices Owning, Credit Remaining), MY ORDERS (Pending, Approved, Rejected), and MY LISTS (Imprest List).

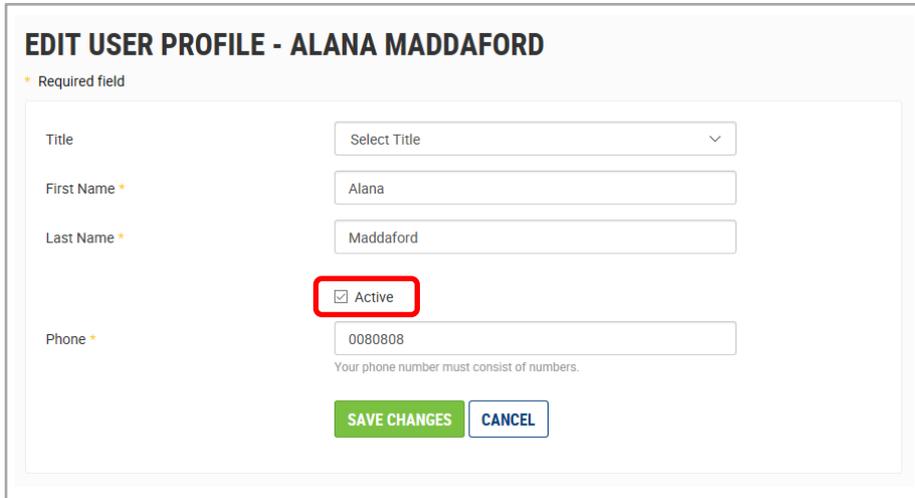
This will direct you to the **USERS** page where a list of all **User(s)** displays, with links to manage each.

5. Click  icon to the right, to edit the relevant User.

The **USER DETAILS** page will display.

6. Click  icon within the **PROFILE** area.

The EDIT USER PROFILE page will display.



EDIT USER PROFILE - ALANA MADDAFORD

* Required field

Title

First Name *

Last Name *

Active

Phone *
Your phone number must consist of numbers.

SAVE CHANGES

An **Active** checkbox is available (**note:** this is ticked by default).
This enables the User to log into their account within the Online Store.

7. To deactivate the User, **untick this checkbox** and click **SAVE CHANGES**.

This will prevent the User accessing the Online Store.

8 Order Management

A User assigned a Customer Account Admin role is granted permission to manage orders for a User(s).

A User with an **order limit** applied to their account, will need to have each order approved by a User with an Approver role or Customer Account Admin role, for that business.

The Online Store will automatically send an email notification to the linked Approver and/or Customer Account Admin role for the User, advising an Order awaits their review and approval.

If the User has checked the Disable Order Approval Notification Email checkbox, no notification email will be issued.

8.1 Sample email notification

Dear John Smith,

Buyer created an order on 06-Dec-2017 that requires your approval.

APPROVE ORDER

If you cannot click the button, copy the following link and paste it to your browser's address input field. For security reasons this link expires in hours.

https://bunzl-uat.intershop.software/INTERSHOP/web/WFS/BUNZL-B2B-Site/en_AU-/AUD/ViewApprovals-Details?BasketID=5rCsEAOReJcAAAFq2VAfcyoJ&ListCase=AllOpen

Order Request ID:	00001705
Purchase Order Number:	00001705
Purchaser:	Buyer
Address:	SOUTHERN CROSS APARTMENTS HOSTEL, COM STREET, 2005000-001
Order Limit:	\$ 0.00
Budget (weekly)	\$ 0.00
Desired Delivery Date:	06/12/17 Demo Account

Kind regards,
BUNZL Notification Service

8.2 Reviewing orders awaiting approval via link embedded within email notification

The Approver can click the embedded link within the Pending Order Approval – Atlas McNeil B2B email notification.

APPROVE ORDER

If you cannot click the button, copy the following link and paste it to your browser's address input field. For security reasons this link expires in hours.

https://bunzl-uat.intershop.software/INTERSHOP/web/WFS/BUNZL-B2B-Site/en_AU/-/AUD/ViewApprovals-Details?BasketID=5rCsEAOReJcAAAFq2VAfcyoJ&ListCase=AllOpen

The Approver will be directed to the **APPROVAL DETAILS** page.

APPROVAL DETAILS

Order request ID:	00002852
Purchase Order Number:	<input type="text"/>
Purchaser:	Buyer
Order Date:	30/01/18
Order Total:	\$ 77.05
Approval Status:	Pending Approval

BUYER APPROVAL

Purchaser:	Buyer	
Order Spend Limit:	\$ 50.00	<div style="width: 150px; height: 15px; background-color: red; position: relative;"> \$ 77.05 </div>
Weekly budget:	\$ 9,223,372,036,854,775,807.00	<input type="text"/>
Already spent:	\$ 146,156.42	(0 %)
Including this order:	\$ 146,233.47	(0 %)
Ship To:	2000000-001	

AMEND ORDER

REJECT

APPROVE

ORDER DETAILS

ITEM DESCRIPTION	QUANTITY	UOM	PRICE	TOTAL
 <p>Allcare Shoe Cover Non-Slip PP Blue SKU: ALOSPPB</p>	1	CT/500		
 <p>Arcoroc Jug 1300mL With Lid SKU: ARCG2662</p>	1	EA		

ORDER SUMMARY

Subtotal: \$ 70.04 AUD
 GST \$ 7.01 AUD
Total: \$ 77.05 AUD

AMEND ORDER

Back to Orders to Approve

REJECT

APPROVE

As the Approver and/or Customer Account Admin User role, you can choose to

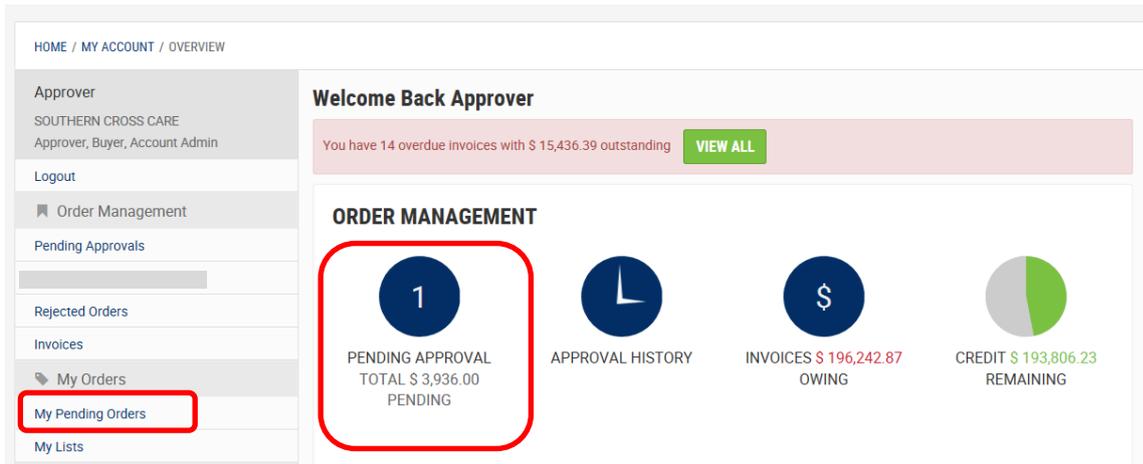
Option for Order	Selected and Action
AMEND ORDER	Ability to review and change the order.
Back to Orders to Approve	Return to PENDING APPROVALS page.
APPROVE	The Order will be approved immediately and submitted on the User’s behalf. <ol style="list-style-type: none"> 1. The User will be notified via email that their Order has been approved and submitted. 2. An Order Number reference code will also be generated for the Order.
REJECT	A pop up window will be displayed, requiring the User to enter a reason (comment) explaining the rejection. <ol style="list-style-type: none"> 1. The Order will be closed and not submitted. 2. The User will be emailed a notification advising them that their Order has been rejected and the reason why.

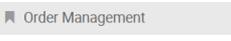
Alternatively, the Approver can access orders awaiting their approval via the  page (refer 9.3).

8.3 Reviewing orders awaiting approval via Sign In

1.  to Atlas McNeil Online Store.
2. Select . This will take you to the Home page of the Online Store.
3. Click  to access account information.

HOME / MY ACCOUNT dashboard details will display.



4. Click **Pending Approvals** within the  navigation menu.

The **PENDING APPROVALS** page displays a list of Orders awaiting approval.

ORDER REQUEST ID	ORDER DATE	SHIP TO	LINE ITEMS	ORDER TOTAL
00002852	30/01/2018	2000000-001	2	\$ 77.05
00002851	29/01/2018	2000000-001	1	\$ 113.31
00002801	23/01/2018	2000000-002	1	\$ 8.99
00002653	18/01/2018	2000000-001	2	\$ 47.73

ORDER REQUEST ID

5. Click on the respective [00002852](#).

This link will open a detailed view of the Order.

ORDER REQUEST ID	ORDER DATE	SHIP TO	LINE ITEMS	ORDER TOTAL
00002852	30/01/2018	2000000-001	2	\$ 77.05

The **APPROVAL DETAILS** page displays.

APPROVAL DETAILS

Order request ID:	00002852		
Purchase Order Number:	<input type="text"/>		
Purchaser:	Buyer		
Order Date:	30/01/18		
Order Total:	\$ 77.05		
Approval Status:	Pending Approval		

BUYER APPROVAL

Purchaser:	Buyer		
Order Spend Limit:	\$ 50.00		\$ 77.05
Weekly budget:	\$ 9,223,372,036,854,775,807.00		\$ <input type="text"/>
Already spent:	\$ 146,156.42	(0 %)	
Including this order:	\$ 146,233.47	(0 %)	
Ship To:	APARTMENTS HOSTEL, MERRY 2160 (2000000-001)		

AMEND ORDER

REJECT

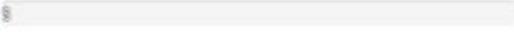
APPROVE

The top section details ID allocated to the order along with Order Date, Order Total etc.

Order request ID:
 Purchase Order Number:
 Purchaser:
 Order Date:
 Order Total:
 Approval Status:

The middle section details Spend Limit, Weekly budget and Spend to date.

BUYER APPROVAL

Purchaser:	Buyer	
Order Spend Limit:	\$ 50.00	
Weekly budget:	\$ 9,223,372,036,854,775,807.00	
Already spent:	\$ 146,156.42	(0%)
Including this order:	\$ 146,233.47	(0%)
Ship To:	APARTMENTS HOSTEL, MERRY 2160 (2000000-001)	

The last section Order Details and actions available.

	ORDER SUMMARY
	Subtotal: \$ 70.04 AUD
	GST \$ 7.01 AUD
	Total: \$ 77.05 AUD
AMEND ORDER	Back to Orders to Approve
REJECT	APPROVE

8.4 Reject Order

Clicking the **REJECT** icon, will prompt the User to input why the order is being rejected.

REJECT ORDER
×

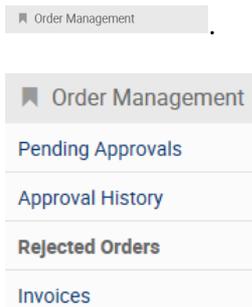
Add a Comment

Your message: 1000 characters remaining.

CANCEL
REJECT

If the User does not wish to **REJECT** the order, click the **CANCEL** icon.

When an order is **Rejected**, the order is placed under the **Rejected Order** sub-menu under



To view reason provided when rejecting the order, the User can click the respective **order request id** number for more detail.

A screenshot of a web application interface showing the 'APPROVAL DETAILS' for a rejected order. The page has a top navigation bar with categories like CLEANING, HEALTHCARE, HOSPITALITY, etc., and user options like ABEN/Aos, MY LISTS, and 0 ITEMS. The breadcrumb trail is HOME / MY ACCOUNT / REJECTED ORDERS / APPROVAL DETAILS - ORDER REQUEST 00000401. On the left is a user profile for John Smith, Southern Cross Care, with a navigation menu where 'Rejected Orders' is selected. The main content area shows order details: Order request ID: 00000401, Purchase Order Number: 709361, Purchaser: John Smith, Order Date: 15/08/17, Order Total: \$ 272.24, and Approver: Alana Maddaford. A note indicates an 'over spend' by Alana Maddaford. The 'Approval Status' is shown as 'Rejected' in a red pill.

8.5 Amend Order

Clicking the **AMEND ORDER** icon, will direct the Approver to YOUR SHOPPING CART ORDER SUMMARY page.

The screenshot shows a shopping cart interface with the following details:

ITEM DESCRIPTION	QUANTITY	UOM	UNIT PRICE	SUBTOTAL
 ARCOROC JUG 1300ML WITH LID SKU: ARC62662	1	EA	\$ 8.17	\$ 8.17
 ALLCARE SHOE COVER NON-SLIP PP BLUE SKU: ALOSPPB	1	CT/500	\$ 61.87	\$ 61.87

Navigation: MY CART | CHECKOUT | RECEIPT

Buttons: CLEAR CART, ADD ALL ☆, **AMEND ORDER** (highlighted), STOP AMEND ORDER

ORDER SUMMARY:

VOICE ADDRESS: MERRY 2000, New South Wales, Australia

SHIPPING ADDRESS: PARTMENTS HOSTEL, MERRY 2000, New South Wales, Australia

Subtotal: \$ 70.04 AUD
 GST: \$ 7.01 AUD
Total: \$ 77.05 AUD

The Approver can change the quantity or remove a product from the shopping cart.

If the quantity is changed and/or a product is deleted, the Approver is required to click **UPDATE CART** to refresh page.

The Approver can now click on **AMEND ORDER** to submit the changes made to the order.

The Approver can then **APPROVE** the order which will submit the order for processing.

8.6 Approve Order

The Approver can click the **APPROVE** icon if satisfied with information contained in order.

A pop up window will display.



To view all approved or rejected Orders, select **Order Management** within the navigation menu.

<ul style="list-style-type: none"> Order Management Pending Approvals Approval History Rejected Orders Invoices 	View all Approved Orders
<ul style="list-style-type: none"> Order Management Pending Approvals Approval History Rejected Orders Invoices 	View all Rejected Orders

APPROVAL HISTORY

ORDER ID	ORDER DATE	SHIP TO	LINE ITEMS	APPROVAL DATE	ORDER TOTAL
00000373	15/12/2017	2000000-000	4	15/12/17	\$ 254.26
00000372	15/12/2017	2000000-024	21	15/12/17	\$ 18,759.47

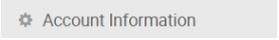
REJECTED ORDERS

ORDER REQUEST ID	ORDER DATE	LINE ITEMS	REJECT DATE	ORDER TOTAL
00000501	01/12/2017	1	01/12/17	\$ 187.97

9 Invoice Management

The Customer Account Admin User role has access to view and pay invoices generated by Users and Ship-to Address Locations linked within their profile.

9.1 Viewing Invoices

1.  to Atlas McNeil Online Store.
2. Select . This will take you to the Home page of the Online Store.
3. Click  to access .

 dash board details will display.

- Select **Invoices** from the left-hand menu navigation area, within the Order Management navigation menu.

The **INVOICES** page will display.

JOHN SMITH | LOGOUT SHIP TO:

SEARCH BY PRODUCT NAME OR SKU

CLEANING HEALTHCARE HOSPITALITY WORKPLACE SAFETY ★ MY LISTS 0 ITEMS

HOME / MY ACCOUNT / MY INVOICE

Smith, John **INVOICES**

Account Admin

Logout

Order Management

Pending Approvals

Approval History

Rejected Orders

Invoices

My Orders

My Pending Orders

My Lists

Order History

All Order History

Account Information

My Profile

Addresses

User Management

Status: Unpaid Invoice Number: Issue Start Date: Issue End Date: **SEARCH**

INVOICE DATE	INVOICE NUMBER	DUE DATE	INVOICE TOTAL
23/08/2017	T880570	30/09/2017	\$ 117.76
22/08/2017	T877996	30/09/2017	\$ 957.15
22/08/2017	T878001	30/09/2017	\$ 394.01
18/08/2017	T874269	30/09/2017	\$ 239.32
18/08/2017	T874278	30/09/2017	\$ 1,131.85
16/08/2017	T869567	30/09/2017	\$ 206.24

Note: All **Unpaid** invoices for the selected **Ship-to Address Location** will list by default.

To change the display to view **Paid** invoices, use the **Status** dropdown menu selection and select **Paid**.

Status

Paid

To change the SHIP TO: Address Location (if more than one), use the selection in the Ship-to field.

Then click within the Select Ship To:* field.

5. Enter search criteria using the available fields, then click **SEARCH**.

To refine a search, use the date parameter fields **Issue Start Date** and **Issue End Date**.

If the User knows the **Invoice Number**, enter this in the field.

The screenshot shows the user interface for John Smith. The top navigation bar includes 'JOHN SMITH | LOGOUT' and 'SHIP TO:'. A search bar is present with the text 'SEARCH BY PRODUCT NAME OR SKU'. The main content area is titled 'INVOICES' and contains a search filter section highlighted with a red box. This section includes a 'Status' dropdown menu set to 'Unpaid', an 'Invoice Number' text input field, 'Issue Start Date' and 'Issue End Date' fields with calendar icons, and a green 'SEARCH' button. Below the search filters is a table of invoices:

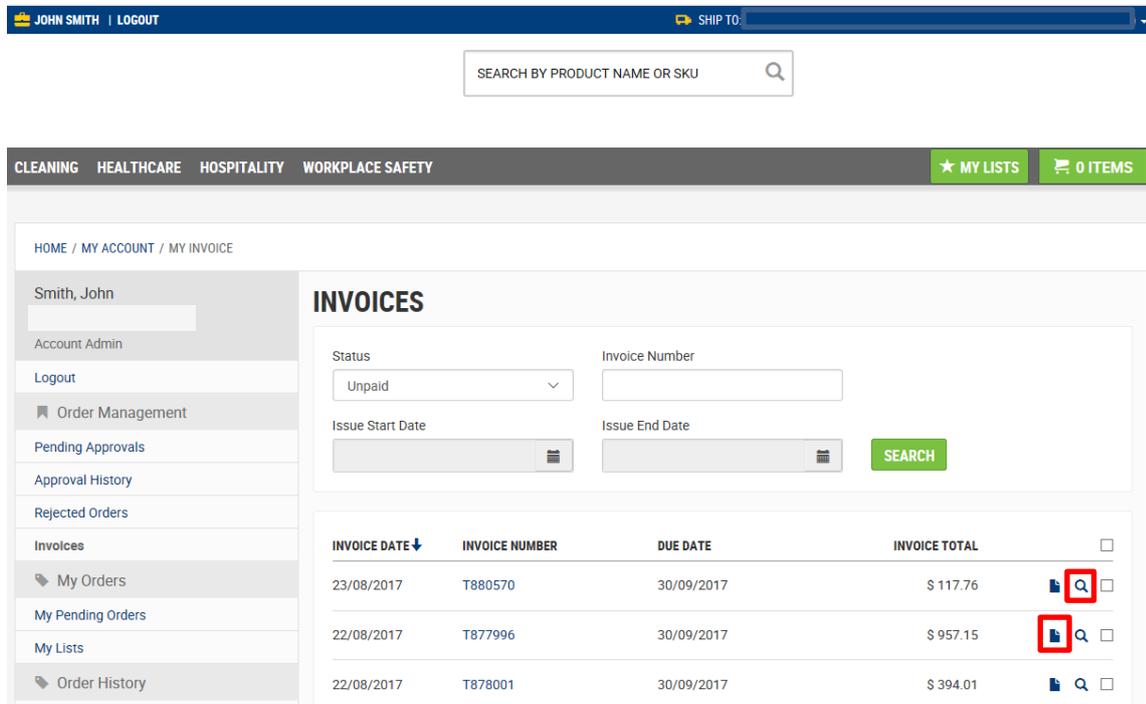
INVOICE DATE	INVOICE NUMBER	DUE DATE	INVOICE TOTAL
23/08/2017	T880570	30/09/2017	\$ 117.76
22/08/2017	T877996	30/09/2017	\$ 957.15
22/08/2017	T878001	30/09/2017	\$ 394.01
18/08/2017	T874269	30/09/2017	\$ 239.32
18/08/2017	T874278	30/09/2017	\$ 1,131.85
16/08/2017	T869567	30/09/2017	\$ 206.24

Field	Purpose	
Invoice Number	Allows a User to enter an invoice number to locate a particular invoice.	This field is not case-sensitive, and will also allow you to enter part of an invoice number if you do not know the entire invoice number.
Start Due Date and End Due Date fields	Allows a User select dates from the calendar icon on the right hand side of each field.	This allows you to enter a date range based on the 'Due Date' of the invoice to more easily locate particular invoices.
Issue Start Date and Issue End Date fields	Allow a User select dates from the calendar icon on the right hand side of eac field.	This allows you to enter a date range based on the 'Issue Date' of the invoice to more easily locate particular invoices.

6. To view an Invoice, select the  icon on the right hand side of the relevant invoice.

Alternatively, download a **PDF** version of Invoice by clicking  icon.

This link will download Invoice Details as a PDF document.



JOHN SMITH | LOGOUT SHIP TO:

SEARCH BY PRODUCT NAME OR SKU

CLEANING HEALTHCARE HOSPITALITY WORKPLACE SAFETY ★ MY LISTS 0 ITEMS

HOME / MY ACCOUNT / MY INVOICE

Smith, John
Account Admin
Logout
Order Management
Pending Approvals
Approval History
Rejected Orders
Invoices
My Orders
My Pending Orders
My Lists
Order History

INVOICES

Status: Unpaid Invoice Number:

Issue Start Date: Issue End Date: **SEARCH**

INVOICE DATE ↓	INVOICE NUMBER	DUE DATE	INVOICE TOTAL	
23/08/2017	T880570	30/09/2017	\$ 117.76	  <input type="checkbox"/>
22/08/2017	T877996	30/09/2017	\$ 957.15	  <input type="checkbox"/>
22/08/2017	T878001	30/09/2017	\$ 394.01	  <input type="checkbox"/>

9.2 Managing Invoices for Multiple Customer/Ship-To's

Depending on the User role assigned will determine whether you can view all Customer/Ship-To's and action accordingly.

INVOICES

Status

Invoice Number

Customer

Ship To

All
2000000-084
2000888-888

Start Due Date

End Due Date

Issue Start Date

Issue End Date

[SEARCH](#)

Currently no invoices to display.

Field	Purpose	Note
Status	Allows a User to select Unpaid or Paid	
Invoice Number	Allows a User to enter an invoice number to locate a particular invoice.	This field is not case-sensitive, and will allow you to enter part of an invoice number if you do not know the entire invoice number.
Customer	Allows a User select a Customer using the dropdown arrow.	All Customers a User is linked to, will be available for selection.
Ship To	Allows a User to select All or selection of Ship To address locations linked to Customer.	All Ship To address locations a User is linked to will be available for selection.
Start Due Date and End Due Date fields	Allows a User select dates from the calendar icon on the right hand side of each field.	This allows you to enter a date range based on the 'Due Date' of the invoice to more easily locate particular invoices.
Issue Start Date and Issue End Date fields	Allow a User select dates from the calendar icon on the right hand side of eac field.	This allows you to enter a date range based on the 'Issue Date' of the invoice to more easily locate particular invoices.

