

Purchasing Manager

Create and Manage Users

Create / Manage Users

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Create New User

A

- Administrator**
Administrators have top level access to all administrative functions and reports and can approve orders.
- Approver**
Approvers can approve orders and access selected administration functions and reports.
- Requestor**
Requestors can place orders and view their order status.

Search for a User Profile (Results Appear on Right)

Enter as much information as you know about a particular user then click 'Go' to search.

By Name or User Name: Last Name
Enter Name or User Name: Enter Name or User Name
By User Role: Any
Go

Edit User Profiles

Select any user from the list below, then click an action.

B

3 users found:

- Erickson, Lisa - Approver
- Erickson, Luke - Requestor
- Erickson, Nancy - Requestor (PENDING)

C

Modify
Delete
User Info

From this screen, you can create new Administrators, Approvers, Requestors, or view, delete or modify any existing users.

- A** Create a new user by selecting from one of these buttons.
- B** Search for a user profile using the fields on the left. The found users will appear in the box on the right.
- C** From this screen you may view a users information, modify their Purchasing Manager profile or delete the user.

Create Purchasing Manager Account

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Create New Administrator

A

ABC Corporate

Clear Previous Next

*User Name: joan.holloway@abccorp.com

*Password: [Redacted]

*Retype Password: [Redacted]

*Email: joan.holloway@abccorp.com

*Verify Email: joan.holloway@abccorp.com

Account Type: Business

*First Name: Joan

*Last Name: Holloway

- A** If your business does not have a Purchasing Manager account set up yet, the first step will be to set up yourself as the Administrator. You will only see the option to set up an Administrator (yourself) at first. You can go back to this screen to create Approvers, Requestors and more Administrators.

View User Information

The screenshot shows the Quill.com user information page. A modal window displays the following information:

- User Details (A):** First Name: Matt, Last Name: Lincoln, User Name: LINCOLN67, Email: matt.lincoln67@quill.com, Phone#: 847-946-5555, Create Date: 2013-11-19. A "View Order History" button is present with a note: "Viewing order history will take you out of Purchasing Manager."
- Authorized Billing Address(es) (B):** NORTHBROOK, Quill Account # 667472, KOENIG & STREY REAL LIVING R E, 1370 MEADOW RD, NORTHBROOK, IL 60062.
- Member of Approval Group(s) (C):** FOREVER 21 STORES - TIER 1, ATTIAS APPROVAL GROUP.
- Ordering Rules (D):** Requires approval by limit(s): Maximum purchase amount: \$800.00.
- Requestors (E):** A list of requestors 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	

From this screen, you can create new Administrators, Approvers, Requestors, or view, delete or modify any existing users.

- A** View user details.
- B** View all authorized billing addresses assigned to user.
- C** View all Approval Groups this user is a member of.
- D** All Ordering Rules will appear here. If you have just made a change to your ordering rules (or approval groups) for this user, you will see a green checkmark.
- E** Any requestors that are routed through one of this user's approval group will appear below. To change the approval group a requestor is routed through, click 'Ordering Rules'.

Creating New User (not registered on Quill.com) - Profile Setup

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Create New Approver Clear Previous Next

ABC Corporate

Is this user registered on Quill.com? Yes No **A**

Please complete the fields below

User Name james.hall@abccorp.com

Password Min 6 characters, max 12 characters, must contain alphanumeric combination. Very Strong

Retype Password

Email james.hall@abccorp.com

Verify Email james.hall@abccorp.com

Account Type Business

First Name James

Last Name Hall

Phone 847 - 834 - 521 x

Role Administrator

Approval Group **B** Select or create approval group Approval groups allow you to assign multiple people to approve purchases to expedite the approval process.

Clear Previous Next **C**

A If the user is not registered, you will select 'No' and be prompted to complete the fields below.

B If you've started completing the fields and decide to change the user from an approver to requestor, you can still make that change from this drop down.

When creating a new approver, you will see a required field for Approval Group. This will place this approver into one or more new or existing approver group(s). Any approver group can consist of a minimum of one person but with as many members as you'd like. This allows you to assign multiple people to approve purchases to expedite the approval process.

Note: When creating a new Requestor, you will not be able to add them to an Approver Group as they will not be approving any orders.

C 'Clear' will reset all fields to blank. 'Previous' will go back to the previous screen. 'Next' will take you to the next step in creating a new user.

Creating New User (registered on Quill.com) - Profile Setup

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Create New Approver

ABC Corporate

Is this user registered on Quill.com? Yes No

Quick Tips:
In order to find a Quill.com registered user, the user must have an address that is associated with your company.

*User Name: joan.holloway@abccorp.com

*Password: [Redacted]

*Retype Password: [Redacted]

*Email: joan.holloway@abccorp.com

*Verify Email: joan.holloway@abccorp.com

Account Type: Business

*First Name: Joan

*Last Name: Holloway

*Phone: [Redacted]

*Role: Approver

*Approval Group: Select or create approval group

Clear Previous Next

A If the new user is already registered on Quill.com, you will select 'Yes' when answering if they are currently registered on Quill.com, and then search from a list of usernames associated with your company account number.

Note: In order to find a Quill.com registered user, the user must have an address that is associated with your company.

B You will not be able to modify any of the user information except for their Role (Administrator, Approver or Requestor.) If they are an Approver, you will be able to modify the approval group(s) they are assigned to.

Creating New User - Assign Authorized Ship-To Locations

The screenshot shows the 'Create New Approver' page in the Quill.com Purchasing Manager. The page is titled 'Assign Authorized Ship-To Locations for James Hall (JHALL)'. It features a 'Create New Delivery Address' button (A) and a 'Sort By' dropdown set to 'Ship-To Locations'. Below this are two columns: 'Available Ship-To Locations' and 'Authorized Ship-To Locations'. The 'Available' column lists several addresses, and the 'Authorized' column shows two addresses, with '111 N WABASH AVE, (CHICAGO, IL)' selected. Between the columns are buttons for 'Add Selected', 'Add All', 'Remove Selected', 'Remove All', and 'Assign Default'. A 'Quick Tips' box provides instructions on how to select multiple lines and assign a default location. At the bottom, there are 'Previous' and 'Next' buttons (C).

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Create New Approver Previous Next

Assign Authorized Ship-To Locations for **James Hall (JHALL)**

To authorize this user for specific Ship-To Locations, highlight them in the list of Available Ship-To Locations and click **"Add Selected"**.

To authorize all currently available Ship-To Locations click **"Add All"**.

Authorize User for All Current and Future Ship-To Locations ?

Create New Delivery Address **A**

Sort By: Ship-To Locations ▾ **B**

Available Ship-To Locations

- 500 STAPLES DR, (FRAMINGHAM, MA)
- 100 SCHELTER RD, (LINCOLNSHIRE, IL)
- CORPORATE DR, (LAKE ZURICH, IL)
- 227 W LAKE ST, (CHICAGO, IL)
- 401 S BLVD # 4, (OAK PARK, IL)
- 111 N WABASH AVE, (CHICAGO, IL)
- 555 W ROOSEVELT RD, (CHICAGO, IL)

Authorized Ship-To Locations

- 227 W LAKE ST, (CHICAGO, IL) - DEFAULT
- 111 N WABASH AVE, (CHICAGO, IL)

Quick Tips:

- Select consecutive lines at once
Click the first one, hold Shift then click the last one. All lines in between will be selected.
- Select multiple lines at random
Hold down the Ctrl key as you click each line.
- Assign a default Ship-To Location
Highlight one from the list of Ship-To Locations above and click "Assign Default".
- View Location Information
Click a Ship-To name and then click the "View Location Information" link below.

View Location Information View Location Information

Previous Next **C**

A Select this button to create a new address.

B Addresses associated with your company from previous interactions will appear on the left. You may select individual or select all address to add them to the right column as authorized ship-to addresses for your new Approver or Requestor.

Click 'Assign Default' to set one of the selected addresses as the default.

C Click 'Previous' to go back a screen or 'Next' to move on to the next step in creating a new Approver or Requestor.

Creating New User - Define Administration Roles and Requesting Rules

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Create New Approver

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

Does NOT require approval (can purchase directly)

A 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: \$

*Route this user through an approval group:

B Marketing Dept Approval Group ▾

Quick Tips:
You must select an approval group in order to add requesting rules. A requestor may only be routed through one approval group.

C

- A** You may assign rules on this screen or at a later time through the Manage Rules section. By default, all new Approvers will not require approval and all new Requestors will require approval.
- B** If the new user requires approval, you will be required to select an approval group to route the requests through.
- C** When you've made all of your selections, click 'Submit' and this new user will be created.

New User Setup Confirmation

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You have successfully added James Hall (JHALL) as a new Approver.

James Hall will receive an email confirming set up in Purchasing Manager including username and password.

A

- A** Instructions regarding what happens next will appear and you can then return to the 'Manage Users' screen to create more approvers or requestors if you'd like.

Modify Approver/Requestor

can approve orders. functions and reports.

User Profile (Results Appear on Right)
Information as you know about a particular user then search.

Last Name

Enter Name or User Name

Any

Go

Edit User Profiles
Select any user from the list below, then click an action.

3 users found:

- Erickson, Lisa - Approver
- Erickson, Luke - Requestor
- Erickson, Nancy - Requestor (PENDING)

Modify **A**

Delete

User Info

A Click 'Modify' on the Manage Users screen to edit a user's profile.

B You will not be allowed to edit the user's profile information such as password, email and phone number. Only the user themselves can modify that information.

C You will be allowed to change the user's role, which approval group(s) they are a member of, their authorized ship-to and bill-to addresses, their ability to access reports, their requesting rules and the approval group their orders will be routed through.

Modify User Profile

ABC Corporate

*User Name LERICKSON **B**

*Password Min 6 characters, max 12 characters, must contain alpha/numeric combination.

*Retype Password

*Email lisaerickson@abccorp.com

*Verify Email lisaerickson@abccorp.com

Account Type Business

*First Name Lisa

*Last Name Erickson

*Phone 8478345215 x

*Role Approver

C *Approval Group Erickson Approval Group Approval groups allow you to assign multiple people to approve purchases to expedite the approval process.

D

D Click 'Save and Continue' to when you are done making role and approval group modifications. Your changes will be saved, however you will have the option to make changes to the ship-to addresses, followed by the bill-to addresses, and report access and rules.