



File #89

Platform: Windows

Setting Up Order Authorizations for Dealer Station



eCommerce Industries, Inc.

What It Does

When you set up a customer account with Dealer Station DDMS Edition, some of the account's buyers may need authorization from their own company to make a purchase.

You can set up authorizations to automate this process, making it easy for you and for your customer to obtain the necessary authorization for any purchase that requires it.

Note: With Dealer Station version 2.5 released May 18, 2002, an Approver Username is now required whenever you specify an Authorized Order Dollar Limit greater than zero in Account User settings. Hence, if you add a new user account or update an existing user account where you have specified an order limit, you may be prompted to specify an Approver Username.

How Authorizations Work

When you set up a customer account, you set up individual users. You'll need to set up each person who buys for this account as a user. You also need to set up people who authorize purchases as users. An account can have as many users as necessary.

Authorization Levels

Each user receives an authorization level. There are 10 levels available, level Ø (lowest authority) through level 9 (highest authority). A person who authorizes a purchase must have a higher authority level than the person who places the order.

Suppose you set up an account for Acme, Inc. They have three people who may purchase from you: Bob Buyer, Sam Supervisor, and Brenda Boss. We might assign the following authorization levels:

Name	Authorization Level
Bob Buyer	Ø
Sam Supervisor	1
Brenda Boss	2

You can assign as many users as you want to any given level. Suppose Acme has four more buyers and two more supervisors. All the buyers can be assigned level Ø, and all the supervisors might be assigned level 1.

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Authorized Order Dollar Limit

You can specify a maximum dollar amount for each user. If a user exceeds the maximum specified in the User Account setting for Authorized Order Dollar Limit, they need approval before the order can be submitted. Dealer Station DDMS Edition puts the order on hold, and e-mails the person who must approve the purchase.

For each user, you can specify the name of the person who must approve person's purchases. The people you specify must have a higher authorization level than the persons they're approving. These authorizers must also be set up first; when you specify the person who can approve another user's order, you can only choose from people who have already been set up for that account at a higher level.

The authorizer can review the order, and change it in any fashion, adding and deleting items, changing quantities, and so forth. The authorizer must then submit the order.

When you set up the maximum dollar amounts for Acme, you might do it like this:

Name	Maximum Dollar Amount
Bob Buyer	\$0.01
Sam Supervisor	\$1000
Brenda Boss	\$0

You specify Sam as Bob's authorizer, and specify Brenda as Sam's authorizer.

By setting Bob at one cent, you ensure that every order he creates gets submitted to Sam for approval. Any order over \$1,000, whether it originated with Sam himself or with Bob, will go to Brenda for approval. If Bob originates the order, it will go first to Sam, since Sam was designated as Bob's authorizer.

Because Brenda was assigned a maximum dollar amount of zero, she has no limit.

Suppose that Bob creates an order for \$500. It goes to Sam for approval. Because this order is below Sam's limit of \$1,000, Sam can give final approval and submit the order. Once Sam submits the order, Bob will get an email saying his order has been approved and submitted.

Now suppose Bob creates an order for \$1,200. It goes to Sam, who approves it. Now it must go to Brenda for approval, since the order exceeds Sam's limit. Since Brenda is set up with no limit, she is the final approver. Once she approves and submits the order, Bob will get an email saying that his order has been approved and submitted.

How the System Requests Approval

When users create orders that exceed their maximum dollar amounts, the system sends an e-mail to the person who is designated to authorize each user's orders.

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Authorization Emails vs. Confirmation Emails

In addition to the authorization emails that happen automatically during the approval process, you can set a parameter to send an email confirmation of an order. Unlike approval emails, which only notify the recipient that an order requires approval or has been approved and submitted, the email confirmation message is a detailed copy of the order.

The addressee can be the account user, that user's supervisor(s), or even accounting personnel.

For example, if we set up Brenda Boss' email confirmation to No, she won't get a copy of her orders via email. If we set it to Yes, she will get an email copy of any orders she places. In addition, since she is the final approver, she will get email confirmation of any order she approves and submits.

However, if we set Bob Buyer to get an email confirmation of the orders he submits, he will not receive any email copies of his orders. Since he cannot approve and submit any orders into the system, the system won't acknowledge Bob's orders until Sam Supervisor or Brenda Boss approve and submit them. However, he may still see the same information if he views Order History.

If we set Sam Supervisor to get an email confirmation, he can get email copies of any orders within his authoriza-

tion limits. But he will not get email copies of his orders that Brenda Boss must approve and submit.

Customers Can Set Up Their Own Authorization

If you wish, you can let customers set up their own authorization. To do this, you set up one person as a super user, and give that person a high authorization level. Super users have access to the admin pages for their own accounts, and can set up additional users for their accounts.

The super user can assign these additional users any authorization level that's lower than the one you assigned the super user. If you assign super users to level 5, for example, they can assign the users they add to levels 4 through 0. Super users can also specify the maximum dollar amount for each user they set up.

Additional Authorization Limits

In addition to the Authorized Order Dollar Limit, two other limits will engage the authorization process:

- **Authorized Line Item Limit Extended Dollar Limit.** This limits the amount per line item on an order, calculated by the unit's price multiplied by the quantity ordered.
- **Maximum Line Item Unit Price.** This limits the amount the user can pay for an individual item.

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How to Do It

- 1 Go to the admin pages on your Dealer Station DDMS edition website.

Specify the user name and password when prompted.

- 2 Click **User Accounts**.

Remember that *when you set authorization levels, it's much more efficient to begin with the users at the highest level*, and work your way down. If you intend to set up users at level 0, level 1, and level 2, for example, set up level 2 first.

- 3 You can set authorization levels while adding a new user, or change the levels for an existing user.

If you want to add a user, click **Add User**, and go to **Step 4**.

If you want to change an existing user, enter the account number, first name, last name, or user name, and click **Submit Search**.

When the list of users that match your search appears, click the appropriate user.

- 4 You have a great deal of flexibility when setting up each user. You can set any or all of the fields circled in the figure on the next page for each individual.

We've already explained what these fields do. Now we'll show you one way we can use these fields to set up the three users for Acme, Inc.

Although you may encounter several parameters on the Account User screen, our case study will focus only on the settings necessary to make the Authorization process work. In addition, although you can set three different types of limits (Order Dollar, Line Item Extended, and Line Item Unit Price), we will focus on the Order Dollar Limit for simplicity's sake.

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Setting Up Brenda Boss

First we set up the top approver for the account, Brenda Boss, as shown on the right:

- **Email Confirmation:** We set this to **Yes**; she may want an email copy of any orders she places, approves, and submits into the system. We also specify her email address.
- **Authorized Order Dollar Limit:** We set this to \$0, indicating that she has no limit.
- **Current User Level:** We have three persons to set up for this account, so we're using levels 0, 1, and 2. We assign the highest level, 2, to Brenda. (Remember that we set up the person with the highest level first; in our example, this is Brenda.)
- **Approval Username:** We leave this blank; the highest person needs no one else's approval.
- **Super User:** We might want to make the highest person for an account a super user. However, if we do, we must train that person to set up accounts. Since we have only three people to set up, it's easier and faster to do this ourselves.

Note: Remember to click **Save** after adding or changing each user's settings.

Email Confirmation	
Send email confirmation of order to addresses below:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Email Addresses: (Separate multiple addresses with semicolon (;))	brenda@officesupply.com
Approval Settings	
Authorized Order Dollar Limit:	\$0
Authorized Line Item Limit Ext. Dollar Limit:	\$0
Maximum Line Item Unit Price:	\$0
Current User Level:	<input type="radio"/> 0 <input type="radio"/> 1 <input checked="" type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5 <input type="radio"/> 6 <input type="radio"/> 7 <input type="radio"/> 8 <input type="radio"/> 9 Lowest Highest
Approval Username:	No approval user required
	<input type="button" value="Update"/>
User Settings	
Super User:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Edit Budgets:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Override Budget Hold:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Override Credit Limit Hold:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Override Past Due Hold:	<input type="radio"/> Yes <input checked="" type="radio"/> No

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Setting Up Sam Supervisor

Next we set up Sam Supervisor, as shown on the right:

- **Email Confirmation:** We set this to **Yes**; Sam may want an email copy of any orders he places, approves, and submits into the system. Of course, only Brenda will receive email copies of Sam's orders that she must approve.
- **Authorized Order Dollar Limit:** We set this to \$1000, indicating that Sam can create or approve orders for up to \$1000.

Note: When entering a number in this box, do not type commas. Enter \$1,000 as 1000, for example.

- **Current User Level:** We set Sam to level 1: lower than Brenda, who must authorize him, and higher than Bob, because Sam must authorize Bob's orders.
- **Approval Username:** We select Brenda Boss as Sam's authorizer. Her name appears here because we set her up first.
- **Super User:** Sam has only one person to authorize, so there is no need to make him a super user.

Note: Remember to click **Save** after adding or changing each user's settings.

Email Confirmation	
Send email confirmation of order to addresses below:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Email Addresses: (Separate multiple addresses with semicolon (;))	sam@officesupply.com
Approval Settings	
Authorized Order Dollar Limit:	\$1000
Authorized Line Item Limit Ext. Dollar Limit:	\$0
Maximum Line Item Unit Price:	\$0
Current User Level:	<input type="radio"/> 0 <input checked="" type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5 <input type="radio"/> 6 <input type="radio"/> 7 <input type="radio"/> 8 <input type="radio"/> 9 Lowest Highest
Approval Username:	Brenda Boss
	<input type="button" value="Update"/>
User Settings	
Super User:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Edit Budgets:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Override Budget Hold:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Override Credit Limit Hold:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Override Past Due Hold:	<input type="radio"/> Yes <input checked="" type="radio"/> No

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Setting Up Bob Buyer

Finally we set up the lowest person for this account, Bob Buyer. His settings are shown at right:

- **Email Confirmation:** We set this to **No**, but even if we set it to Yes, he would not receive email copies of the orders he places. Since Bob will not be able to submit orders into the system without Sam's or Brenda's approval, the system will not acknowledge Bob as the submitter.
- **Authorized Order Dollar Limit:** We set this to \$0.01, indicating that every order Bob creates must be placed on hold until it receives approval.
- **Current User Level:** We set Bob to the lowest level, 0.
- **Approval Username:** We select Sam Supervisor as Bob's authorizer. His name appears here because we set him up earlier.
- **Super User:** As the lowest person, there is no need for Bob to be a super user.

Note: Remember to click **Save** after adding or changing each user's settings.

Email Confirmation	
Send email confirmation of order to addresses below:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Email Addresses: (Separate multiple addresses with semicolon (;))	<input type="text"/>
Approval Settings	
Authorized Order Dollar Limit:	<input type="text" value="\$0.01"/>
Authorized Line Item Limit Ext. Dollar Limit:	<input type="text" value="\$0"/>
Maximum Line Item Unit Price:	<input type="text" value="\$0"/>
Current User Level:	<input checked="" type="radio"/> 0 <input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5 <input type="radio"/> 6 <input type="radio"/> 7 <input type="radio"/> 8 <input type="radio"/> 9 Lowest Highest
Approval Username:	<input type="text" value="Sam Supervisor"/>
	<input type="button" value="Update"/>
User Settings	
Super User:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Edit Budgets:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Override Budget Hold:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Override Credit Limit Hold:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Override Past Due Hold:	<input type="radio"/> Yes <input checked="" type="radio"/> No

