

# USER & SITE MANAGEMENT

## Account Administrator

Customers with multiple users and/or multiple sites will be able to nominate an account administrator. The account administrator will be able to

- Set approval and approver limits for other users,
- Add new users,
- Edit user information like name and email address

**User Maintenance**  
Create and maintain users

E.g. Managing user order, requisition and approval limits. Add a limit that the user is able to approve for other users. Add your cost centres to the customer account.

## Manage Multiple Customer Accounts (Super Users)

Switch Account ABC Clinic

Account Select

Code	Name
1234567	ABC Clinic
263975	123 Residences
129734	XVZ Facility

Switch Account ABC Clinic

If you manage multiple SSS Australia customer accounts (e.g. multiple site group), you can now switch between them quickly and easily using the switch account function.

In your order dashboard, you can also view the order history and invoice history for all of the accounts you manage, so it is easy to review for multiple accounts.

**!** **NB:** If you need to be set up as a super user, please contact your personal account manager.

## Approval Protocols

Customers can set approval protocols with two parameters;

1. Budget restrictions
2. Approved product lists

! **NB:** Approvals need to be set up by SSS Australia. Contact your personal account manager if you would like to utilise approvals on your account.

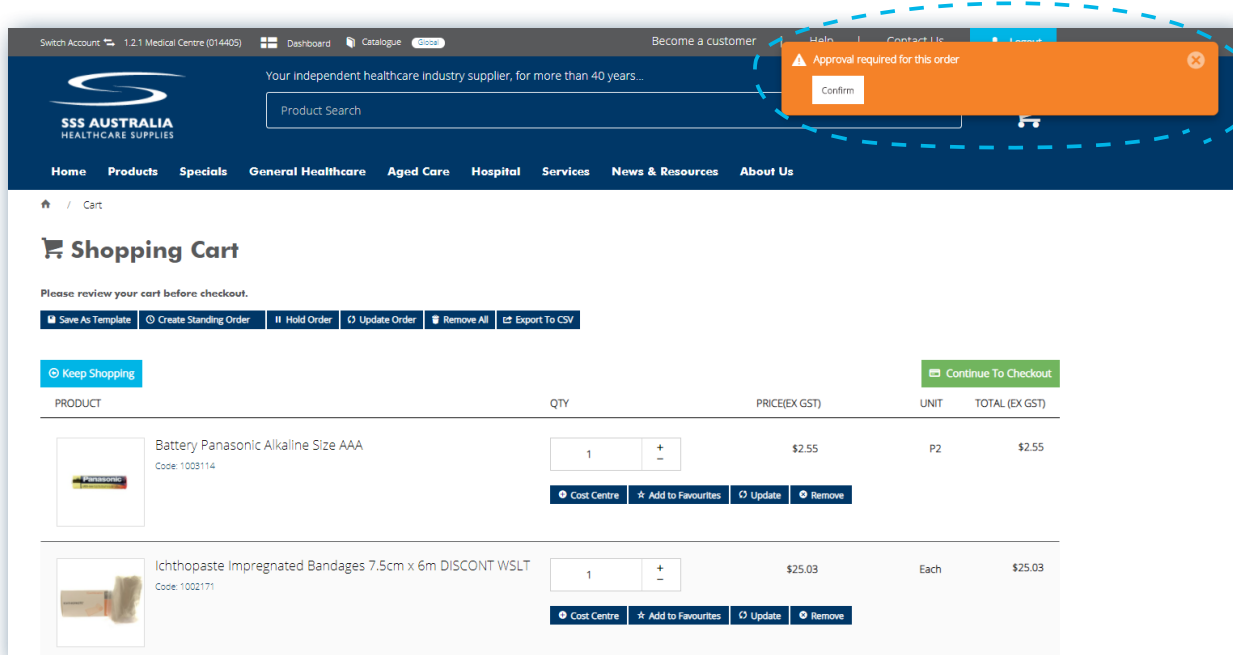
## Budget Restrictions

Budget restrictions can be set up by account administrators in the user maintenance section of the dashboard, or by SSS Australia. There are two types of budget restrictions, Order Value and Requisition Value.



Order Value is how much that user is approved to order without the order needing to go for approval. If the user does not need an order value restriction, set the value to \$999,999.

Requisition Value is the absolute limit a user can order (approval or not). Keep in mind if you set a requisition limit, the user will be denied to ability to send orders over that value for approval, meaning the approver will not even be notified of the order attempt. We recommend using this feature sparingly. If the user does not need a requisition value restriction, set the value to \$999,999.

To set a user up as an **approver**, you just need to place a value in the Approval Value section that is higher than the users Order Value. This gives customers the ability to set up multiple approvers at different value breaks.



The screenshot shows the SSS Australia website interface. At the top, there is a navigation bar with links for 'Home', 'Products', 'Specials', 'General Healthcare', 'Aged Care', 'Hospital', 'Services', 'News & Resources', and 'About Us'. Below the navigation bar is a search bar and a 'Product Search' input field. A prominent orange warning box is overlaid on the page, stating 'Approval required for this order' with a 'Confirm' button. Below the warning box, the 'Shopping Cart' section is visible, containing a table of items:

PRODUCT	QTY	PRICE(EX GST)	UNIT	TOTAL (EX GST)
 Battery Panasonic Alkaline Size AAA Code: 1003114	1	\$2.55	P2	\$2.55
 Ichthopaste Impregnated Bandages 7.5cm x 6m DISCONT WSLT Code: 1002171	1	\$25.03	Each	\$25.03

## Approved Product Lists

Approved product lists can only be set up by your personal account manager. They allow you to set a list of approved products for your team to order without requiring approval. If a user tries to place an order that includes products that are not on the approved list, the order will go to the approver before it is placed with SSS Australia.

**NB:** Approved product lists must be set up by SSS Australia. Talk to your personal account manager about setting up your approved product list today.

## Approval Emails & Dashboard

In the approvers dashboard, the approver will be able to review, edit and approve (or reject) orders they are responsible for reviewing. The orders will be placed on hold until they have been approved (or edited and approved). Orders requiring approval can be viewed in the dashboard by both the original order placer and the approver.

**Order #100173139 Requires Approval**  
 Order contains non contract item(s)

**Entered by:**  
 Whitney Webb ([whitney.webb@sssaustralia.com.au](mailto:whitney.webb@sssaustralia.com.au))

**Customer:**  
 SSS Australia

**Phone:**  
 1800 777 518

**Comments**  
 testing

**Quick Approval:**  
[Approve Order](#) [Amend Order](#) [Reject Order](#)

**Order Summary**

Item	Qty	Price (ex GST)	Unit	Total (ex GST)
HealthSource Jenni Wipes 21 x 26cm Pack of 20 Code: 1231933 <b>THIS IS A NON CONTRACT ITEM</b>	1	\$2.15	P20	\$2.15
Precise Defend Hand Sanitiser (80% Ethanol) 500ml Flip Cap Code: 1431811 <b>THIS IS A NON CONTRACT ITEM</b>	1	\$8.00	Each	\$8.00
Flexwipe Alcowipe 42 x 14.5cm Canister P75 Code: 1327380 <b>THIS IS A NON CONTRACT ITEM</b>	1	\$6.50	P75	\$6.50
Disposable Face Shield Code: 1437879 <b>THIS IS A NON CONTRACT ITEM</b>	1	\$18.95	P10	\$18.95
Subtotal (ex GST)				\$35.60
Shipping				\$12.60

Email Example (approver)

**Order Approval**

Below is a list of orders that require approval by you.

Search for Orders

5 records (1 page)

Order No.	Order date	Entered By	Your Reference	Total (Inc. GST)	Options
100164641	27-Jan-2021	andrew.khuu@commercevision Acc Code - Tricare Stafford Heights		\$20.61	<input type="button" value="View"/> <input type="button" value="Approve"/> <input type="button" value="Reject"/>
100171579	27-Jan-2021	whitney.webb@sssaustralia.com Acc Code - Tricare Stafford Heights		\$93.06	<input type="button" value="View"/> <input type="button" value="Approve"/> <input type="button" value="Reject"/>
100171586	27-Jan-2021	andrew.khuu@commercevision Acc Code - Tricare Stafford Heights		\$33.66	<input type="button" value="View"/> <input type="button" value="Approve"/>

Dashboard Example (approver)