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GENERAL OVERVIEW

Synergy provides a robust and flexible User environment to manage User Access and Permissions, Budgets, Spending Limits, General Ledger (“GL”) codes, place Orders, Browse Products and set the domain (customer – site location) for which to place an order if the User has multiple site responsibility.

User also has the ability to access Customer Service (if this has been enabled for your account). Customer Service places a real time call to the back end system to provide up to the minute Accounts Receivable information including Proof of Deliver, Order status, Product Usage, Sales History and Customer PO Search.

User Profile and Permissions

The system allows the initial set up of a Regional Manager, Manager, and User. The rolls of each are as follows:

Regional Manager

The highest-level user is the Regional Manager. This is initially set up by the System Administrator when giving you access to the system. If the customer has multiple location accounts tied to a main Bill To account, the by default the system associates the Regional Manager to all the Child Account locations or Regions. The Regional Manager will then have full administrative privileges for those Child Account locations. The Regional Manager has full access to all of the features of the system including Sites, Budgets, GL and Product Searches. If there are no Child Accounts or regional locations then the highest-level user is Manager for the one Customer Account.

Manager

The second level user is Manager. The System Administrator initially sets this up when giving you access to the system. The Manager can be associated with an individual Child Account. The Manager has the ability to set up Users and to define their rolls, sites, and permissions. The Manager has full access to all of the features of the system including Sites, Budgets, GL and Product Searches.

Note: Throughout the User Guide, reference is to “User”. Unless otherwise specified this refers to anyone who accesses the System. If it is necessary in the context to distinguish
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the User’s profile the Guide will refer to Manager, Regional Manager, or User accordingly.

User

The lowest level of permissions or access is the User. Their Manager or Regional Manager sets up the User’s profile and permissions. The User is tied to one or more Domains (Customer – Ship To Locations) or Sites. The Manager can set the User’s profile, login and password; define permissions: Enter Orders, View Master Order Guide, View Product Catalog, Create and Edit Shopping Lists, View Prices, Enter and edit GL codes; and set Spending Limits – Overall and/or Daily and assign the Manager that has approval authority.

Security

User ID and Password control user access. The Administrator must assign and set up the Manager for security access codes before you can begin. The Manager can then set up other Users. Access codes are used to make sure the information that is displayed is specific to the User. User ID and Password should never be shared with anyone else or left available for others to see.

Following is diagram of one of the possible Regional Manager, Manager, and User associations:

Budgets
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Budgets are a Domain (Customer-Site) level control. Budgets may be set up or modified on the Budgets page. Only a Manager can access the Budgets page. The Budget is maintained on your Vendor’s back end system.

When a Budget is set up it will control the spending for the Domain (Customer-Site) regardless how the order was enter. Orders entered by some means other than On-Line, such as over the phone are tracked in Budgets. Conversely, when a Manager changes a Budget it is change for the Domain (Customer-Site) and will control orders entered by any method.

Budgets can be set by Date or Amount.

If a Budget is set by Date it can be defined to be Monthly, Quarterly, Semi-Annual, Annual or Custom. If Monthly, Quarterly, Semi-Annual, or Annual are chosen the system will automatically define the end date to be the last day of the last month in the period. If Monthly, Quarterly, Semi-Annual, or Annual are chosen the system will automatically renew the Budget for the same time period and amount. If Custom Date is selected it will end on the date selected.

If Amount or Purchase Order (PO) sets a Budget it will not automatically renew.

A Purchase Order (PO) may be tied to a Budget. If the Budget is PO specific, it will remain in effect during a defined date or period and dollar amount. It will not renew once one of those parameters are exceeded.

If a Budget expires and does not automatically renew the system will treat the order as having exceeded the Budget and place the order on hold. The Budget can be manually renewed or cleared altogether.

Spending Limits

Spending Limits are a User level control. A Manager or Regional Manager does not have Spending Limits. Spending Limits may be set and/or modified by the User’s Manager. Only a Manager can access the Spending Limits set up and edit them.

Spending Limits can control the Total Dollar amount the User is authorized to spend without approval or the Per Order Dollar amount the User is authorized to spend without approval or both Spending Limit and Per Order Limit.

Spending Limits can be defined to be by Daily, Weekly, Bi-Weekly, Monthly, Semi-Annual, Annual, or Custom Dates.

In setting up Spending Limits the Manager is given the opportunity to determine whether they automatically renew and who the Manager (if there is more than one for the Customer) who can authorize the transaction that exceeds the User’s Spending Limits.
**PO Hold Review**

PO Hold Review forces any Order placed by a User to go on hold. The User’s Report To Manager must then enter a PO on the Order and approve the Order.

**Regional Manager Review**

Regional Manager Review forces any Order placed by a User to go on hold. The User’s Report To Manager must then review and approve the Order. The Order then goes to the Regional Manager to review and approve the Order.

**General Ledger Codes**

General Ledger Codes consist of five fields of six alpha-numeric characters. The GL Codes can correspond to your back office accounting system configuration or can be any system of product or product/site tracking the User wants to create. Shipping Location can tie the GL Codes to a product. Additionally, depending on the User’s profile and permissions the User can add or edit the individual GL Code tied to a product on a specific order at the time of order submission. A User can tie one GL Code to the entire order at the time of order submission. The actions at order submission will be tied only to the order being submitted.

Depending on preferences, the GL Codes will print on Invoice and will be available for reporting purposes.

**Place Orders**

Orders can be created from one of multiple methods or combination of methods. The principle tools are Order Guide, Product Catalog search and Your Lists.

**Order Guide**

The Order Guide consists of a list of all products purchased by the Domain (Customer – Site) in the passed no matter how the order was placed (On-line, over the phone, etc.) The Guide can view by Site List – just the items purchased by the Site or by Master List – items purchased by every one of the Customer’s sites. The profile/permissions for the User determine whether they can see the Master List.

The User can check and add items to the Cart or to a List that they can save and refer to later.
Product Catalog

The Product Catalog is a list of all available products. The User can search for products by various methods (see Browse Products) and add them to a Cart or List. The Product Catalog also allows the User to drill into Product Detail for more information about the product and to manage Product – General Ledger Account Codes.

Your Lists

Your List allows the User to set up, retain, or delete Lists as they desire. The List can be named by the User. The Lists are tied to the User.

Browse Products

The Product Catalog allows the User to browse products by Category, Vendor, or Word Search.

Category Search displays the highest-level category first. The User can drill down into the sub-categories until the lowest level to display a List of Products that meet the criteria.

Vendor Search displays the Vendors available. The User can drill down to display a List of Products for that Vendor.

Word Search allows the User to enter a word or words to search for in the System. A search of descriptions and attributes of all products will be performed. The System will display a List of Products that meet one or more of the words entered.

On the List of Products, the User can add products to the Cart add products to a List, get their price on a product that they have never purchased before and drill down into Product Detail.

Domain

The Domain is the Customer / Ship To Location combination or Site. If the User has access to multiples Domains (Sites), the System will allow them to change the Domain (Site) location for which they are ordering at any point in time during the ordering processes.
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General Navigation

Menu

Menu buttons appear on the top of each page to allow navigation to other areas of the site.

Line Display

Throughout the system when a User search for product or uses one of the tools to select from a list of products a list is displayed on the right hand side of the page. The User places a quantity in the quantity box on the line display on the left. The User has the following options to select.

- Displays date and quantity of the purchase of the product by that site.
- Adds the product to an existing Shopping List or allows User to create a new List and add the product to it.
- Adds product to the Mini Cart.

Mini Cart
Synergy.net User Guide

The system features a Mini Cart on the left hand side of the page that shows a running recap of the products the User has selected using the icon above the Mini Cart the system displays a bar warning the User of the status of the Budget, Sending Limits (SL) and Per Order Spending Limit (POL).

Budget

Budget Amount is the total amount of the Budget for the Site.
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Budget Used is the total dollar amount invoiced and the open orders for the Site that have a Ship Date within the parameters of the Budget set up by the Manager. (It does not include the order in process until it is submitted to the vendor from the Cart Page.)

Spending Limit

SL is the Spending limit for the User as defined by the Manager.

Used SL is the total dollar amount invoiced and the open orders that have been placed by the User for any site during the parameters of the User’s Spending Limit set up by the Manager. (It does not include the order in process until it is submitted to the vendor from the Cart Page.)

Per Order Limit

POL is the Per Order Limit for the User as defined by the Manager.

Used POL is the dollar amount of the order in process on the system.
LOGIN

The Login Id and Password must be assigned by the System Administrator or a Manager level User for you to access Online Order Entry and all its features.

The Login Id User profile/permissions determine what areas of the system may be inaccessible to a particular User.

You should never share your Login Id or Password to anyone.

Enter a valid Login Id and Password in the labeled boxes and click the Log In button for access to the System.

Login Page:

When you first Login the system will ask you to set your preference as to Ship To Domain. Once set the system will automatically default to that location. However, if you change the location and log out the system will remember that location until you change it.
HOME PAGE

After logging in, User lands on their Home Page. The Home Page is comprised of the following sections: the top Menu section consists of User identification, navigation Menus and Links; the middle Domain section consists of Customer - Site location focus, the middle Orders section displays the Last 10 Orders and Orders Pending Approval information; and the bottom section display areas of special interest.

Customer Service – Click on Customer Service link to go to the Customer Service page where the following real time information can be viewed: Accounts Receivable information with signed Proof of Delivery, Order Status, Usage information, Sales information, PO Look Up. (Note: this is an optional feature.).

Help – Click on Help link for context sensitive Help and for General Overview

Home – Click on Home link to be brought back to this main menu screen.

Cart - Click on this link to view, or edit all the products you’ve already selected for purchase.
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Español – Click on Español link to toggle language setting from English to Spanish.

Order Guide – Click on Order Guide link to go to the Order Guide page. Here you can select from products that you have ordered in the past. (Displays web and none web orders.) User can display by Site List (those items ordered by the site location and by Master List. (Access to Master List is dependent on User’s permissions.)

Shopping Lists – Click on Shopping Lists to go to the Shopping Lists page. Shopping List allows the User to set up, retain, or delete Lists, as they desire. The List can be named by the User. The Lists follow the User.

Products – Click on Products to go to the Products catalog search page. User can search for products by Category, Vendor, or Word(s) Search.

Budgets (Managers only) – Click on Budgets to go to the Budgets page. User can set up and modify Budgets depending on their level of access.

Orders History – Click on Orders History to go to the Orders page. User can sort Orders by Cleared and On Hold and by date range.

Users- Click on Users link to view a list on manager and users associated with you organization. On this page Managers or Regional Managers can set up, edit and delete Users with the level profile/permissions as they have access and lower.

- Click on the Change button to change the site you are ordering for (Only needed if user is responsible for multiple sites)

- Update button becomes active after using the CHANGE button to change sites. Update locks in the information for the new site (orders, shopping lists, etc.) (Only needed if user is responsible for multiple sites)

- Click on this link to reveal via dropdown box the last 10 Cleared orders processed by the sites this user is responsible for.

- Click on this link to reveal via dropdown box the last 10 orders processed by the sites this user is responsible for that are waiting to be cleared due to reaching either user spending, or budgetary limits.(Managers have the ability to review details of the orders here, and either approve, or delete the order).

- Click on this button to exit Synergy.
CUSTOMER SERVICE

Customer Service – Click on Customer Service link to go to the Customer Service page where the following real time information can be viewed: Accounts Receivable information with signed Proof of Delivery, Order Status, Usage information, Sales information, PO Look up. (Note: this is an optional feature.)

The System then accesses the back office data to return real time information from all sources not just the web.

Click on one of the available icons to view the information.

Customer Service Links

- Allows User to view real time the vendor’s account receivable activity for their sites. View recent Payments, credits, and invoices for this site. Drill into the invoice number to see detail of that invoice as well as view the proof of delivery.

- Displays 24 month sales for this site by unit, and Dollar amount. For one specific product, or all the products the customer buys.

- Display active orders and their status.

- look and on display all order in the vendor system for a specific PO.

- Display total dollar sales for the past 24 month for this site.
ORDER GUIDE

General Information

The Order Guide consists of a list of all products purchased by the Site in the passed no matter how the order was placed (On-line, over the phone, etc.) The Guide can view by Site List – just the items purchased by the Site or by Master List – items purchased by every one of the Customer’s sites. The profile/permissions for the User determine whether they can see the Master List.

The User can check and add items to the Cart or to a List that they can refer to later.

Options

Site List – When User goes into Order Guide the Site List is displayed by default.

Master List – If the User’s permissions allow them to see the Master List (list of all previously purchased items for the Customer at all of their Sites), click on Master List to display the list of all items from every Site. Once Master List is clicked, the title of the page will change and the button will rename to Site List. The User can toggle back and forth between the Site List and the Master. By default the Site List displays when the User first goes into Order Guide.
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Place items in the Mini Cart by entering a quantity in the quantity box and selecting the Add to Cart icon.

Previously purchased icon and add to List icon are also available.

PRODUCT CATALOG

General Information

The Product Catalog contains all available products. The User can search for products by various methods and add them to a Cart or List. The Product Catalog also allows the User to drill into Product Detail for more information about the product and to manage Product – General Ledger Account Codes.

Product Catalog Search

The Product Catalog allows the User to browse or search for products by Category, Vendor or Word Search.

By default the Product Category Search displays initially.

Category Search displays a list of Product Categories. The highest level category displays first. The User can drill down into the sub-categories until the lowest level display a List of Products that meets the criteria.

- displays if there are lower levels of categories available

- displays if the User has reached the lowest level category available.
Click on the lowest level category to display the list of products that match the search.

Product Selection

Place items in the Mini Cart by entering a quantity in the quantity box and selecting the Add to Cart icon.

Previously purchased icon and add to List icon are also available.

Add Items to Shopping List
Click on Add to Shopping List to add the selected items (shown with a different line color) to an existing List.

Product Detail
Click on the Product Id link to drill into the Product Details page.

Additional product information and attributes are displayed on the Product Details page including a large picture and Long Description if available.

User can add or update the GL Code tied to a product consisting of five fields of six alpha/numeric records. GL Codes can correspond to the Customer’s back end system or any other identification system the User wishes to employ.

Click on the Apply GL Code to Shipping Locations box if User desires to apply the GL Codes for the product to All of the Site locations for the Customer.

Click on Update GL Code to set the GL Code record for the product / customer combination.

On the Product Details page the User can Add Item to Cart or Add Item to List.
Vendor Search

Vendor Search displays the list of Vendors available. Click on the Vendor selected to drill down to a display List of Products for that Vendor.

Word Search

Word Search allows the User to enter a word or words to search for in the System. A search of descriptions and attributes of all products will be performed. The System will display a List of Products that meet one or more of the words entered.
SHOPPING LISTS

Shopping Lists allows the User to set up, retain or delete Lists as they desire. The List can be named by the User. The Lists are tied to the User.

Create New List

To create a new List on the Shopping Lists fill in the name of the List in the text box along side of Create New List. Click on the Save List button.

Review Lists

Select a list from the list box on the page and choose the option to view List Details or Delete List.

Custom Shopping Lists

Add Shopping Lists assignable to specific Users in the order desired from a text .csv file that can be loaded into the system from your desktop.
REORDER LISTS

Reorder Lists allow the User to set up, retain, or delete Lists, as they desire. The User names the List. The Lists are set up for a specific location (Domain). The User adds a Reorder quantity to set the quantity level that they wish to maintain at their location. The User can modify the order in which the lines list. The list is printed or exported to excel to provide a count sheet. User then fills in Quantity On Hand. The system automatically calculates Reorder Quantity to build the order.

Left click the mouse to drop and drag the order of the lines.
QUICK ENTRY

Use Quick Entry to enter a Product Id and Quantity to quickly build an order.

BUDGETS

General Information

Budgets are a Domain (Customer-Site) level control. Budgets may be set up or modified on the Budgets page. Only a Manager can access the Budgets page. The Budget is maintained on the Vendor’s back end system.

When a Budget is set up it will control the spending for the Domain (Customer-Site) regardless how the order was enter. Orders entered by some means other than On-Line, such as over the phone are tracked in Budgets. Conversely, when a Budget is changed by a Manager it is change for the Domain (Customer-Site) and will control order entered by any method.

Budgets are set by Date or Amount.
Synergy.net User Guide

If a Budget is set by Date, it can be defined to be Monthly, Quarterly, Semi-Annual, Annual, or Custom. If Monthly, Quarterly, Semi-Annual, or Annual are chosen the system will automatically define the end date to be the last day of the month in the period. If Monthly, Quarterly, Semi-Annual, or Annual are chosen the system will automatically renew the Budget for the same time period and amount.

If Custom Date is selected it will end on the date selected and will not automatically renew.

If a Budget is set by Amount it will not automatically renew.

A Purchase Order (PO) may be tied to a Budget. **If tied to a Budget the Budget will not automatically renew**

### Budget Options

Initially, select Type: By Date or By Amount.

If By Date, then select the date range. The options are M-Monthly, Q-Quarterly, S-Semi Annual, A-Annual or Custom.

Selection of M, Q, S or A allows the User to enter a starting date. The System will automatically select and ending date based on the last complete month in the selected time period. An example is as follows:

- **Q-Quarterly**
  - Start Date – August 5
  - End Date – October 31 (System generated)

The System will automatically renew the Budget until it is changed or terminated by the User.
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Selection of Custom allows the User to enter a starting and ending date. If Custom, the System will not automatically renew at the end of the time period selected.

**Budget Entry**

User can enter a Budget amount. (Note: This is the amount for the entire Site Domain selected regardless of who placed the order or how it was place – web, phone, etc.)

User can enter a PO number that will be tied to the Budget.

Click on Clear Screen to reset all of the Budget parameters on the screen.

Click on Set/Update Budget make a real time call to the back end system to actually set or change the Budget. A message will display to indicate that the Budget was created or changed.

**Note:** The Budget is maintained on the Vendor’s back end system. This allows the Budget to track transactions against the Budget from different Users and different ways the orders may be entered.

**Budget Tracking**

On the Mini Cart page the System will display the Budget message in **Red** if the amount of the pending order exceeds the Budget for the Domain (Site). An Order that is over Budget will be placed on Hold and all Managers for the Domain (Site) will be notified.

**ORDER HISTORY**

View web order history by date range and Type: All, Ordered and On Hold.
Custom Report

View Custom Reports from the Reports Link

Select the Criteria

Select the Report Type

Data and Chart display.
Click on active links to drill down into detail.
Additional level of detail is available to view or export to excel or print.
CART

Cart Information

The Cart Information displays the Customer / Ship To Location (Domain) for which the User is currently placing an order. Cart Total displays the Total of the order. If the Totals box is displayed in green the Cart amount does not exceed Spending Limits for the User or the Budget for the Site. If either the Spending Limit or the Budget is exceeded the Total for the Cart is displayed in red warning the User.
User can name and save a Cart as a Shopping List. To save the Cart as a List, fill in the Name of the list in the text box and click on Save List.

The System allows the User (User’s permissions must include the ability to edit GL Codes) to designate a GL Code for the entire order. To designate a GL Code for the entire order click the check box and fill in the GL Code for the order.

**Cart Details**

Cart Details is a list of the products on the Cart (order) including the Product ID, Description, Unit of Measure, GL Code (editable depending on User permissions), Quantity, Price, and Line Total.

On the Line the User can change the GL Code (depending on User permissions), change the Quantity or delete the line.

Click on Re-Calculate Price if everything is acceptable and the User is ready to submit the Order. The System will make a real time call the Vendor’s back end system to update and verify data.

Upon completion of the Re-Calculate Price the Payment Options display.

If desired add PO Number and Special Instructions for the Order.

Click on Edit Order to return to the lines on the Cart to edit existing GL Codes or Quantities or to delete lines.
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User can add Lines at any time prior to submission of the Order by returning to any of the methods in place to select products.

Click on Cancel Order to cancel/delete the pending order.

Click on Submit Order to submit and finalize Order. Orders that do not meet Spending Limits or Budget requirements will be placed On Hold and submitted to authorized Manager for review.

Upon completion of Submission, an Order Confirmation page with order details is displayed and a Confirmation of the Order is e-mailed to the designated person.
USER SET UP & EDIT

Landing Page

Manager or higher level profile/permissions allows the User to create, edit and delete Users and their profiles.

The User created or accessed can be the same level profile or lower. Users do not have access to a level profile higher than themselves.

The Landing Page when accessing User, lists all of the Users that have been set up by the User accessing the page. Identification information including password is listed on the page so the User should be careful not to allow unauthorized individuals to view this information.

On the Landing Page the User can Create a New User, Edit a User or Delete a User.

Create a User

Click on the Add a User Icon and select the User Type from the drop list box.

Select whether to allow user access to Reorder Lists and Reorder List with Inventory.
Select the Permissions (links to be accessed) of the User. If a box is not checked the User will not see the link when they are logged into the system.

View Chart and View Mini Cart will have a significant effect on the display viewed by the User.

If View Chart or View Mini Cart are not checked these controls will not be displayed and the User’s view be just of the item lines.

Select PO On Hold Review to always place an Orders on hold requiring the User’s Manager to place a PO on the order and release the order.
Create a Non-Manager User

Select “User” from the list box in Create a User.

There are three steps to create a User: Primary Information, User Domain, User Roles.

**Primary Information**
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On the Define a User page complete the User’s profile. Make sure to fill in all of the boxes Name, Login Id, Password and E-mail address.

Set the Permissions that you want to allow User access to by checking the appropriate boxes. If the box is not checked the User will not see the link.

User Domain

Select the individual or Select All of the Domains (Customer / Shipping Location combinations) that the User will be able to place orders for.
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The Domains selected will be available on all pages in the Domain area for the User to change and select.

User Roles

Order Placement – Check is the User will be allowed to place orders.

If Order Placement is checked then the Spending Limits window will open.

Spending Limits are tied to the User. (Note that Budgets are tied to the Domain – Customer / Shipping Location combination.)

Select the Date Range Type of Spending Limit for the User: Daily, Weekly, Bi-weekly, Monthly, Bi-monthly, Semi-annual, Annual, or Custom.

Select the Start Date and the End Date.

Select whether the Spending Limit is to Auto Renew. If Auto Renew is selected the Spending Limit will renew when the End Date is reached. The Date Range will not be affected.

Place the dollar amount in the Limit Amount box.

Select whether to place a dollar amount on a per order basis by checking the Per Order box. If selected, place a dollar amount in the box.

Select the Manager who is authorized to approve the orders for this User that exceed Spending Limits and Budgets.
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### Order Guide / Master and Site

Check the Master and Site if the User is permitted to view the Order Guide (Previously Purchased) information for all of the sites.

### Product Catalog

- **GL Code** check if User is permitted to edit GL Codes.
- **View Price** check if User is permitted to view Prices
- **View Catalog** check if User is permitted to view the entire Product Catalog but cannot place items in the Cart from the Catalog.

### Submit

Choose Submit or Cancel to create the User or cancel the creation or update.
Create a Manager

Click on Create a New User. Select the Regional Manager or Manager from the list box.

Primary Information

On the Define a User page complete the User’s profile. Make sure to fill in all of the boxes Name, Login Id, Password and E-mail address.

User Domain

Select the individual or Select All of the Domains (Customer / Shipping Location combinations) that the User will be able to place orders for.
The Domains selected will be available on all pages in the Domain area for the User to change and select.

Complete the Define User profile and click Go to User Domain icon.

System will not display the User Roles section since the Manager by definition has full Permissions, Full access to all Domains for his/her Company and no Spending Limits.

Submit

Choose Submit or Cancel to create the User or cancel the creation or update.

Orders on Hold

When a User places an order that exceeds the Budget, Spending Limit or Per Order Limit it is placed on Hold. The User and report to Manager is notified by e-mail that the order is on hold. The order is also displayed on the User’s and the Manager’s Home Page.
The order can be Approved, Edited and Approved or Deleted by the Manager. To do so the Manager must select the order click on the Order ID. The order detail will display and the options appear on the bottom of the order.

Pending Order Report

The Manager can examine the other orders pending approval by site and by User by selecting the Pending Order Reports link.
The Manager can drill down into the order, approve the order or by clicking the User link display the Spending Limit information for that User.

Check the order to be approved or select the individual order to display details.