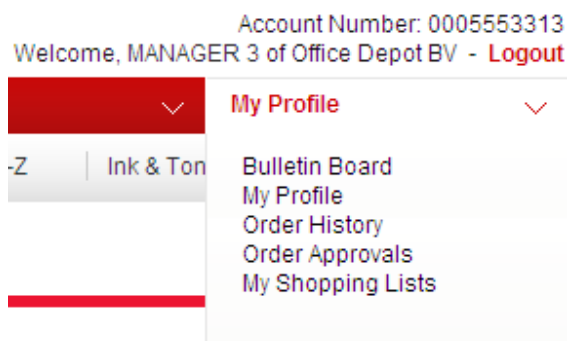


CREATE WORKFLOW

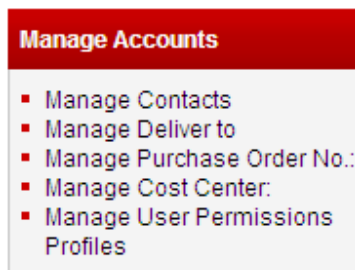


How Can a Customer Create a Workflow

1. Log in as super user
2. Go to **My Profile** and click on **My Profile**



3. Select the option *Manage User Permissions Profiles*



4. Click on **CREATE A NEW PERMISSION PROFILE**

Permissions Profile

[CREATE A NEW PERMISSION PROFILE](#)

The form to create a new permission profile appears.

5. Fill out the form as follows:
- * Profile Name = name of the profile (in this example authorization initial approver)
 - * Per Order Limit = not to be filled out
 - * Approval Limit = enter the maximal amount the initial approver is allowed to approve. In this case he is allowed to approve orders up to € 20.00.
- Now click on **ADD**.

Manage Accounts

- Manage Contacts
- Manage Shipto #
- Manage Purchase Order No.:
- Manage Release:
- Manage Cost Center:
- Manage User Permissions Profiles

Manage Users

- Add New Users
- Edit Active Users
- Active/Inactive Users
- Workflows

Order Setting

- My Account Overview
- Select Shipto #
- Select Contacts
- Select Purchase Order No.:
- Select Release:
- Select Cost Center:
- Proxy Approver Info

Need Help?

- Email Assistance
- FAQs

Create Profile

* Profile Name

Order Limit

Add

* Required Information

* Per Order Limit

* Per Unit Price Limit

* Per Line Limit

* Per Period Limit

* Minimum Order Value

Place any order containing non-contracts items on hold for approval.

Approval Limit

* User may approve orders up to

User may approve orders that exceed budget limits

User may approve orders containing custom-catalog restricted SKUs

User may approve orders containing non-contract SKUs

[Return to Account Center](#) [Back to Manage Profile](#)

6. Create a 2nd permission profile by following the same steps as before.

- Manage Accounts**
 - Manage Contacts
 - Manage Shipto #
 - Manage Purchase Order No.:
 - Manage Cost Center:
 - Manage User Permissions Profiles
- Manage Users**
 - Add New Users
 - Edit Active Users
 - Active/Inactive Users
 - Workflows
- Order Setting**
 - My Account Overview
 - Select Shipto #
 - Select Contacts
 - Select Purchase Order No.:
 - Select Cost Center:
 - Proxy Approver Info
- Need Help?**
 - Email Assistance
 - FAQs

Create Profile

* Profile Name

Order Limit

Add

* Required Information

* Per Order Limit

* Per Unit Price Limit

* Per Line Limit

* Per Period Limit

* Minimum Order Value

Place any order containing non-contracts items on hold for approval.

Approval Limit

* User may approve orders up to

User may approve orders that exceed budget limits

User may approve orders containing custom-catalog restricted SKUs

User may approve orders containing non-contract SKUs

[Return to Account Center](#) [Back to Manage Profile](#)

Once the above is done, you can create the workflow.

7. Go to my **My Profile** and click on **My Profile**

Account Number: 0005572822
Welcome, OFFICE DEPOT of Office Depot - [Logout](#)

Technology ▾ **My Profile** ▾

View All Products A-Z | Ink & Toners

catalogue

- Bulletin Board
- My Profile
- Order History
- Order Approvals
- My Shopping Lists

8. Next, click on **Workflows**

Manage Users

- Add New Users
- Edit Active Users
- Active/Inactive Users
- Workflows

9. Click on **CREATE A NEW WORKFLOW**
Workflows

[CREATE A NEW WORKFLOW](#)

Approver Workflows

This is a complete list of available workflows. Select a workflow to edit its settings.

Workflow	Last Updated	By User
RAIWORKFLOW	24/05/12	
TEST 2	24/05/12	

10. Now the form appears in which you can create the workflow. Fill it out as follows:

Workflow Name: fill out the name you want to give to the workflow.
Select: **Sequential Release**.

Fill out the approval levels.

Level 1: fill out the name of the initial approver. This should always be **regular user**.

Now fill out the remaining approval levels. All need to be **regular users**.

Enter the name of the final approver under **Max Tier**. This is the person that makes the final decision about whether or not an order is placed.

This can only be a **super user**.

Click **SAVE A WORKFLOW** to complete the process.

Workflows

Create a Workflow

* Users need to be in the same group in order to view and approve orders.

Workflow Name:

Select one of the following:

Sequential Release

Highest Approver Only

Approver Level	User Name	User Name	Email/Group	
1	WORKFLOW1 Select User	REGULAR USER AUTORIS	EBUSINESS@OFFICEDEPOT.NL	Remove
2	Select User			
3	Select User			
4	Select User			
5	Select User			
6	Select User			
7	Select User			
8	Select User			
9	Select User			
10	Select User			
Max Tier:	WORKFLOW Select User	SUPER USER	E-BUSINESS.BENELUX@OFFICEDEPOT.COM	Any Amount Remove

Note: Modifying this workflow will not affect any orders currently pending approval.

SAVE A WORKFLOW

11. As soon as the workflow is created, it will be added to the overview of the workflows.

Workflows

CREATE A NEW WORKFLOW

Approver Workflows

This is a complete list of available workflows. Select a workflow to edit its settings.

Workflow	Last Updated
RAIWORKFLOW	24/05/12
TEST	22/07/10
TEST 2	24/05/12

12. Now go to **Edit Active Users**

Manage Users

- Add New Users
- Edit Active Users
- Active/Inactive Users
- Workflows

Select the user for whom you want to create the workflow.
As you can see below, there is no workflow yet.

Workflows/Approvals

Permissions Profile:
ALLES AUTORISEREN
Single Approver:
goedkeurder
Workflow Template:

EDIT

13. Click on **EDIT**
14. You now enter a screen where you can link an authorization profile or workflow. For this login name, select **APPROVE ALL** at the authorization profile. This ensures that all orders over € 0,01 are forwarded for approval.
Workflow Template: choose **“TEST”**
They can be found by clicking on **SEARCH**.
Do not fill out anything in **Single Approver**.

Now the window below will appear. Click on **UPDATE**.

Update Workflows/Approvals information

User Permissions (optional)

Permissions Profile:

Enter a Workflow Template: [What is a Workflow Template?](#)

OR

Single Approver: [Assign a Single Approver](#)

15. Verify your changes by looking under **Workflows/Approvals**:

Workflows/Approvals

Permissions Profile: Approve all

Single Approver:

Workflow Template: Test

Proxy Approver Info

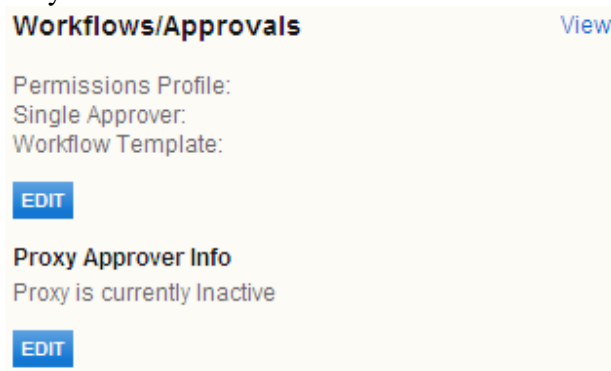
Proxy is currently Inactive

16. Now we are going to link a user to the workflow. Go to **Edit Active Users**.



An overview of login names appears.

As you can see the window below is not filled out.



17. Click on **EDIT** to adapt this.



18. Fill out the following information:
authorization profile: First Approver
select a workflow: here you are to select the workflow you have created
In this case: **Test**. You can find this workflow by clicking on **Search** once more. The field 'authorizer' is to remain empty.
The screen now reflects the below, now click on **UPDATE**.

Update Workflows/Approvals information

User Permissions (optional)

Permissions Profile:

Enter a Workflow Template: [Search](#) [What is a Workflow Template?](#)

OR

Single Approver: [Search](#) [Assign a Single Approver](#)

19. Check whether everything went well by clicking open the '+' **Workflows/Approvals**. The screen now reflects the below.

Workflows/Approvals [View](#)

Permissions Profile:

Single Approver:

Workflow Template:

Proxy Approver Info

Proxy is currently Inactive

The workflow now is arranged correctly.
The customer can place an order.

The screenshots below are shown to the shopper when placing an order.

The products are placed in the shopping cart and the order is completed.
The customer now sees: send for approval.

When the customer clicks the button they will see the following message on ODO:

Please Note
 Your order will now be sent for approval for the following reasons:
 Autorisatieprofiel: all orders have to be approved by the Superuser

They will also receive the following e-mail:

Workflow Status	Details:
Submitted by: REGULAR USER BESTELLER on 7/29/13	
Pending approval by: REGULAR USER AUTORISATOR 1	
Comments for the order:	

Order number:	3203276487	Username:	REGULAR USER BESTELLER
Order date:	7/29/13	Customer number:	0005641654
		Purchase Order:	
		Contact:	REGULAR USER BESTELLER
Status:	Held for Approval: Autorisatieprofiel: all orders have to be approved by the Superuser	Cost center:	
Deliver to:		Comments:	

Office Depot
 Demo Account
 E-commerce
 Columbusweg 33
 VENLO, 5928 LA
 Netherlands
 0773238959

Product number	Product description	Order-Quantity	Unit price	Unit of measure	Extended Price
5397474	KNUTSELLIJM PRITT 90G	1	€	ST	€

Legend:
Order quantity:Original ordered quantity
UOM:Unit of Measure
Sales Unit:Price per individual unit
DeliveryDate:Expected delivery date
 *:Indicates multiple deliveries
TotalPrice:Ordered Quantity x Unit Price

Subtotal:	€
Additional charges:	€
VAT:	€
Total:	€

Payment type:Account Billing

Thank you for your order at Office Depot Online.
 We received the following order number 3203276487 that was placed by REGULAR USER BESTELLERThis order is pending approval.

REGULAR USER

An order has been placed by REGULAR USER and it was sent for approval. REGULAR USER1 is the first approver and will receive the following e-mail.

Workflow Status		Details:	
Last approved by:	REGULAR USER BESTELLER	on	7/29/13
Pending release by:	REGULAR USER AUTORISATOR 1		
Comments for the order:			

Order number:	3203276487	Username:	REGULAR USER BESTELLER
Order date:	7/29/13	Customer number:	0005641654
		Purchase Order:	
		Contact:	REGULAR USER BESTELLER
Status:	Held for Approval: Autorisatieprofiel: all orders have to be approved by the Superuser		Cost center:
Deliver to:	Office Depot Demo Account E-commerce Columbusweg 33 VENLO, 5928 LA Netherlands 0773238959		Comments:

Product number	Product description	Order-Quantity	Unit price	Unit of measure	Extended Price
5397474	KNUTSELLIJM PRITT 90G	1	€	ST	€

Legend:
Order quantity: Original ordered quantity
UOM: Unit of Measure
Sales Unit: Price per individual unit
Delivery Date: Expected delivery date
 *Indicates multiple deliveries
Total Price: Ordered Quantity x Unit Price

Subtotal: €
Additional charges: €
VAT: €
Total: €

Payment type: Account Billing

Please click the "Release Order" button or the "Disapprove/Modify" button
 You will be asked to enter your user ID and password in order to release the order.

[RELEASE ORDER](#) [Disapprove/Modify](#)

If you use cookies, you can also approve by e-mail.

My Orders

- [Order History](#)
- [Order Approvals](#)

Click on the order number and scroll down to approve or cancel the order.

Deselect all	Order Number	Subtotal excl. VAT	Total incl. VAT	Order Date	Cost Center	Status	Contact	Type	Approver:
<input checked="" type="checkbox"/>	3203274835	€	€	29/07/13		Held for Approval	REGULAR USER BESTELLER	BSD net	WORKFLOW1

[RELEASE SELECTED](#) [Cancel Selected](#)

After approving the order you will receive the following e-mail:

Workflow Status		Details:	
REGULAR USER AUTORISATOR 1 on 7/29/13			
Comments for the order:			
Order number:	3203274835	Username:	REGULAR USER BESTELLER
Order date:	7/29/13	Customer number:	0005641654
		Purchase Order:	
Status:	Customer Service Hold	Contact:	REGULAR USER BESTELLER
Deliver to:		Cost center:	
		Comments:	
Office Depot Demo Account E-commerce Columbusweg 33 VENLO, 5928 LA Netherlands 0773238959			

Product number	Product description	Order-Quantity	Unit price	Unit of measure	Extended Price
5121918	ALLESLIJM PRITT 90G	1	€	ST	€

Legend:	
Order quantity: Original ordered quantity	
UOM: Unit of Measure	
Sales Unit: Price per individual unit	
DeliveryDate: Expected delivery date	
* :Indicates multiple deliveries	
TotalPrice: Ordered Quantity x Unit Price	

Subtotal:	€
Additional charges:	€
VAT:	€
Total:	€

Payment type:Account Billing

Thank you for your order at Office Depot Online.
We received the following order number 3203274835 that was placed by REGULAR USER BESTELLER

The order now has been sent for approval to the final decision maker.

ODO authorizer

The order has been approved by the first approver and the final approver has received an e-mail.

Workflow Status		Details:	
Vrijgegeven door:	REGULAR USER1	Op 2-12-11	
Wacht op vrijgave van:	SUPER USER		
Opmerking voor vrijgave:			
Ordernummer:	3202669634	Gebruikersnaam:	REGULAR USER
Orderdatum:	2-12-11	Klantnummer:	0005575313
		Uw referentie:	E-COMMERCE
		Contactgegevens:	REGULAR USER
Status:	Wacht op goedkeuring: Autorisatieprofiel: iedere order dient goedgekeurd te worden door de hoofdbesteller.	Kostenplaats:	KP TEST
Afleveradres:	Demo Office Depot BV	Onderdeel:	Locatie Desktop
	ODO Training klantnummer Afdeling E-commerce Columbusweg 33 TEST VENLO,5928 LA Nederland 077-3238959	Opmerkingen:	

If you use cookies, you can also approve by e-mail.

My Orders
<ul style="list-style-type: none"> ▪ Order History ▪ Order Approvals

He now can select each order and opt either approve or cancel. Order specifics can be viewed by clicking on the order number.

Klik op het ordernummer om de orderdetails te zien, of eventuele bezorginformatie.

Orders in de wacht

Resultaat 1 - 10 van 14 Pagina: 1 2 | [Volgende](#) [Laatste](#)

Selecteer alles <input type="checkbox"/>	Ordernummer	Subtotaal excl. BTW	Subtotaal incl. BTW	Besteldatum	Leverdatum	Referentie	Kostenplaats	Vrijgave	Orderstatus	Voornaam	Bestelwijze	Goedkeurder:
<input checked="" type="checkbox"/>	3202669634	€	€	2-12-11	5-12-11	E-COMMERCE	KP TEST		Wacht op goedkeuring	REGULAR USER	BSD net	ODO AUTORISATOR

[ORDER\(S\) VRIJGEVEN](#) [Order\(s\) afkeuren](#)

As soon as the order is approved an e-mail is sent.