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# Order Approval Hierarchy System How to Guide

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## What is the Order Approval Hierarchy System?

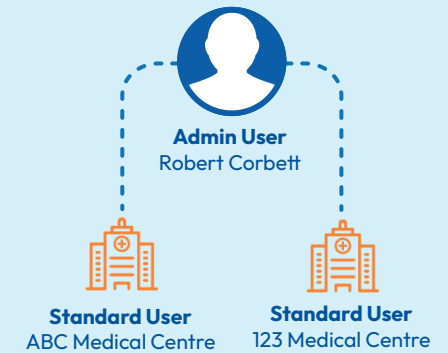
The Order Approval Hierarchy System allows for orders to process through an approval process before the order is placed for fulfillment.

For the online customer portal, there are two main types of users:

- **Standard Users** - these users once logged in can only access a single Team Medical customer account.
- **Admin Users** - these users once logged in have access to multiple Team Medical customer accounts and the order approvals page.

For example, in the diagram on the right if the Standard User ABC Medical Centre placed an order, that order would then need to be approved by the Admin User Robert Corbett.

This how-to guide explains a bit more about the Order Approval Hierarchy System and available configuration options.



## Configurations for the Order Approval Hierarchy System

The order approval hierarchy system can be set up with configurations for:

- **Product Types** - requiring approvals for certain types of products
  - Consumables
  - Equipment
  - Flu Vaccines
  - Non-Flu Vaccines
- **Budget** - set a monthly budget for ordering, the budget amount can vary per month

The above parameters can be combined to allow for an approval system that factors in budget and product types.

If required this system can be set-up with multiple levels of approvals.

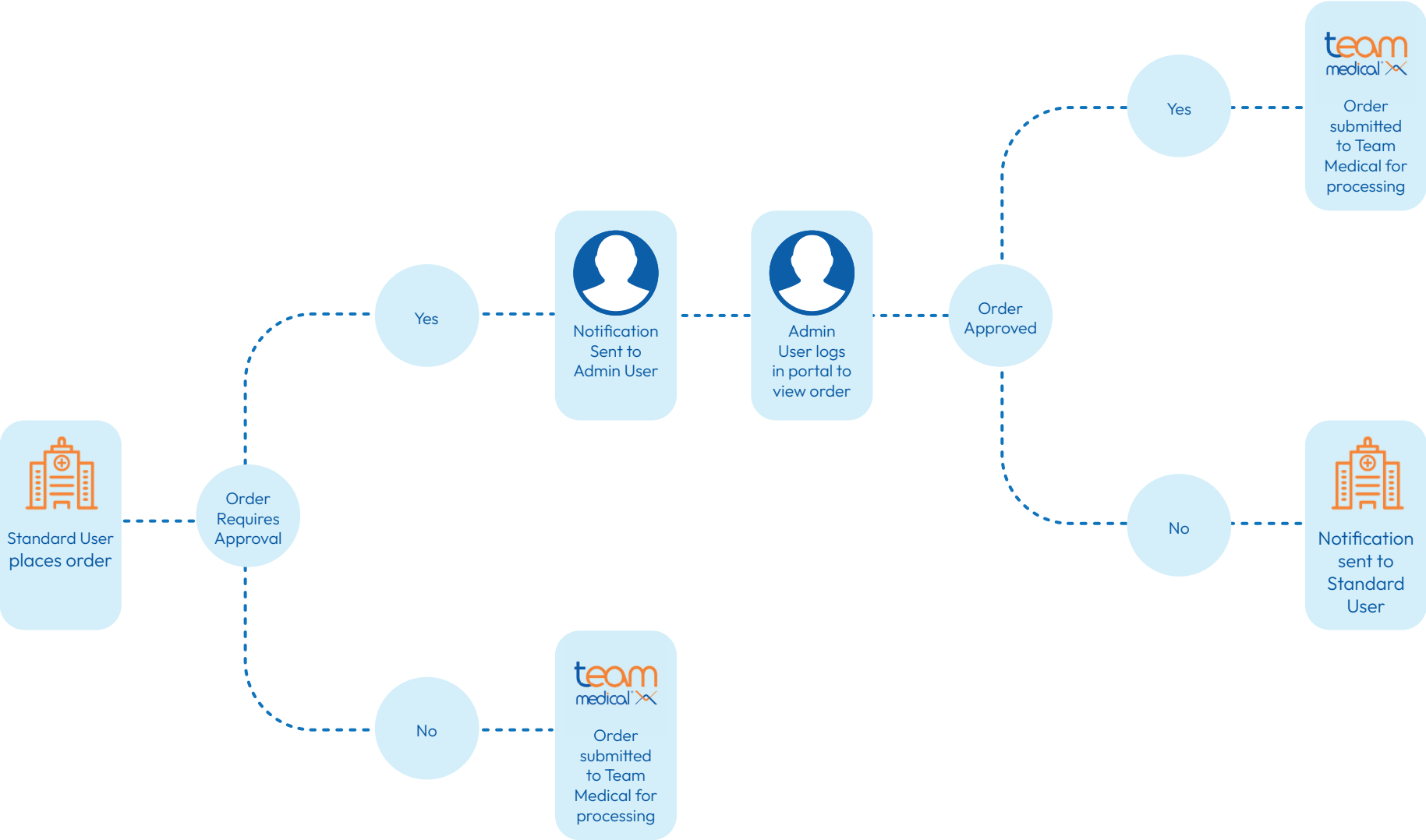
On the right we've included some example configurations.

**Note:** Access to the Administrator Portal and the Order Approval Hierarchy System requires additional configuration. To request access, please speak to your Team Medical Account Manager.

### Example Configurations

- **All orders**  
When is the order sent for Admin User approval? Every order regardless of product or spend.
- **Budget Only**  
e.g. monthly budget of \$2000.00.  
When is the order sent for Admin User approval? Once their monthly spend exceeds \$2000.00.
- **Product Type Only**  
e.g. approval needed for all equipment products.  
When is the order sent for Admin User approval? If an order is submitted for any equipment product.
- **Budget and Product Type**  
e.g. monthly budget of \$500.00 for non-flu vaccines.  
When is the order sent for Admin User approval? Once the monthly spend for vaccines exceeds \$500.00 orders are then sent to the Admin User for approval.
- **Combined Product Type Budget**  
e.g. monthly budget of \$7500.00 to spend on consumables and vaccines.  
When is the order sent for Admin User approval? Once the monthly combined spend on consumables and vaccines exceeds \$7500.00.

# Workflow for the Order Approval Hierarchy System



## Submitting an Order for Approval

The Standard User logs-in and adds all of their required product to their shopping cart.

Once ready to place their order the user goes to their shopping cart.

### Shopping Cart for Users with a Budget

If the user has any budget configurations it will display their current budget status in the shopping cart.

- **Green:** these products are within the allocated budget, these products can be ordered without approval.
- **Orange:** the budget for these products is close to being exceeded, these products can be ordered without approval.
- **Red:** the budget for these products has been exceeded and these products will go through an approval process before being submitted to Team Medical.

Note: the current spend includes the contents of the shopping cart, any open orders, back orders and any invoice orders for the current month.

How the budget is displayed will depend on the budget configuration. In figure 1, the customer account has different budget allocations for different product types, in figure 2, the customer has a combined budget for all product types.

### Starting the checkout process

Click on the "checkout" button to start the checkout process. This will take you to the delivery and order details page.

Checkout

Continued on next page

Figure 1

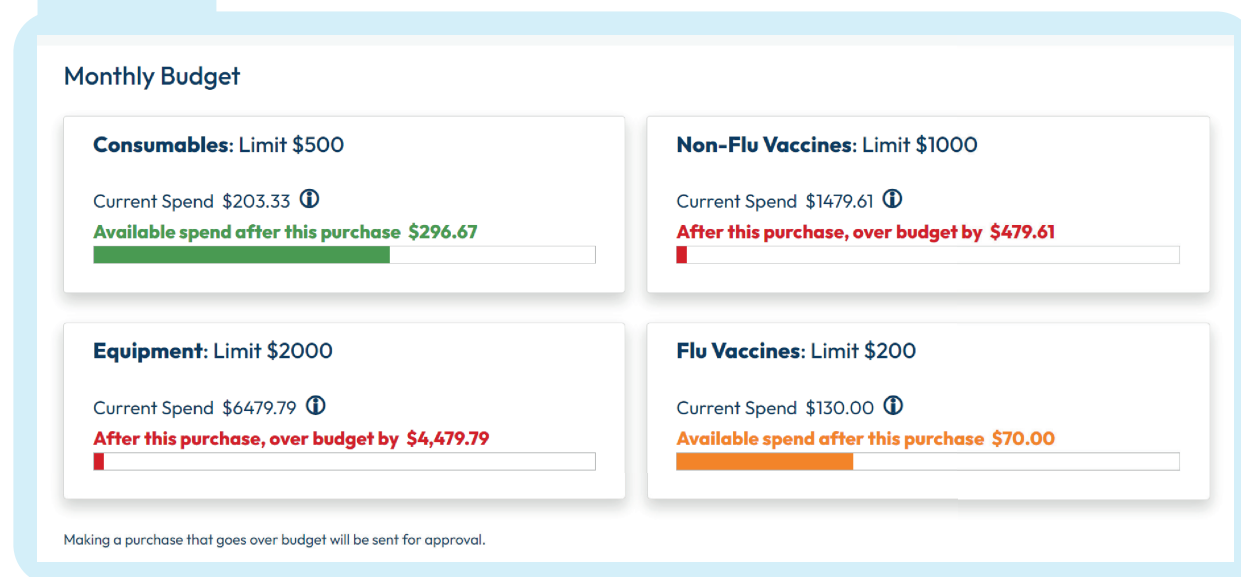


Figure 2



## Submitting an Order for Approval

### Entering Order & Delivery Details

Review the order and delivery details for your order.

- If required enter a reference or Purchase Order number in the Purchase Order/Reference box, this will appear on the invoice and will also be viewable by the Admin User.
- Enter the contact name for the order in the contact name field. This is a mandatory field.
- Select the delivery address from the Set Delivery Address drop down menu.
- If you have any special instructions for Team Medical or our Courier Partners enter them into the comments box.

When ready, click on the "continue" button.

Continue

Continued on next page

The screenshot shows the 'Checkout' page on the Team Medical website. The page is titled 'Checkout' and features a 'Back to Cart' button at the top left. The main content area is divided into two sections: 'Order & Delivery Details' and 'Summary'.

The 'Order & Delivery Details' section contains the following fields:

- Purchase Order/Reference:** A text box containing 'Washroom Order'.
- Contact Name\*:** A text box containing 'Emily'.
- Set Delivery Address:** A text box containing 'ABC MEDICAL CENTRE 123 APPLE STREET WYNNUM QLD 4178'. Below this, a note states: 'This order contains scheduled drugs. You will not be able to select a delivery address that is not under the license or permit we have on file. If an address should be permitted but cannot be selected above, please call us on 1300 22 44 50.'
- Delivery Address:** A text box containing 'ABC MEDICAL CENTRE 123 APPLE STREET WYNNUM QLD 4178'.
- Delivery Instructions:** A text box containing 'Deliver to delivery dock'.
- Comments (Limit to 300 Characters):** A text box containing 'Deliver to delivery dock'.

The 'Summary' section on the right displays the following information:

Summary	
SUBTOTAL (ex GST)	\$5,143.47
TOTAL GST	\$510.53
<b>TOTAL</b>	<b>\$5,654.00</b>

At the bottom of the page, there are two buttons: 'Back to Cart' and 'Continue'.

Four orange arrows point from the text instructions on the left to the corresponding fields in the 'Order & Delivery Details' section: from the first bullet point to the 'Purchase Order/Reference' field, from the second bullet point to the 'Contact Name\*' field, from the third bullet point to the 'Set Delivery Address' field, and from the fourth bullet point to the 'Comments' field.

## Submitting an Order for Approval

### Confirming the Order

Accept the Terms and Conditions by ticking the Terms and Conditions box.

In the comments for approval box enter any comments for the Admin User. This will be viewable by the Admin User when they complete the approval process.

When ready click the Submit Order button.

Submit Order

teammed.com.au/shop/?page=confirmation

Back to Checkout

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### Confirm Order

#### Confirm Order and Delivery Details

Purchase Order  
TEST ORDER

Contact Name  
TEST ORDER

Delivery Address  
ABC MEDICAL CENTRE  
123 APPLE STREET  
WYNNUM QLD 4178

Comments

By ticking this box, I agree to the Terms & Conditions and Privacy Policy of Team Medical Supplies

Comments for Approval:  
Comments here are only for the approver. Any comments for Team Medical, such as delivery comments must be placed on the previous screen.

Our dermatoscope has broken and we need a replacement.

Back to Checkout

Submit Order

Summary	
SUBTOTAL (ex GST)	\$5,143.47
TOTAL GST	\$510.53
<b>TOTAL</b>	<b>\$5,654.00</b>

teammed.com.au/shop/?page=completion

Logged in as 2158085

Click here to return to Admin Portal

Fast Delivery Nationwide Over 9000 Products Online Australian Owned Call Us 1300 22 44 50

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I am looking for...

Contact Us Order Forms My Account

My Cart

SHOP BY PRODUCT SHOP BY PROFESSION About Us Meet our Team

Diagnostic Equipment Medical Equipment Furniture & Fittings Wound Care Surgical Instruments Disposables & General Supplies Pharmaceuticals

### Order Confirmation (Successful Order)

Your order has been successfully received at Team Medical Supplies.

For additional enquiries please email us at [info@teammed.com.au](mailto:info@teammed.com.au)

Consumable & Equipment & Flu Vaccine & Non-Flu Vaccine products have been moved to order 2511403 for authorisation.

### Order Confirmation

Once the order has been submitted, the Standard User will see the order confirmation page.

If the order or any of the products on the order require approval a message will display on the order confirmation screen.

The Admin User will also be sent a notification via email that there is an order for them to review for approval. No further action is required by the person placing the order.



## Accessing the Administrator Portal

When an order is submitted that requires approval the Admin User will be notified via email. The email includes a hyperlink to the Team Medical log in page: [www.teammed.com.au/login](http://www.teammed.com.au/login)

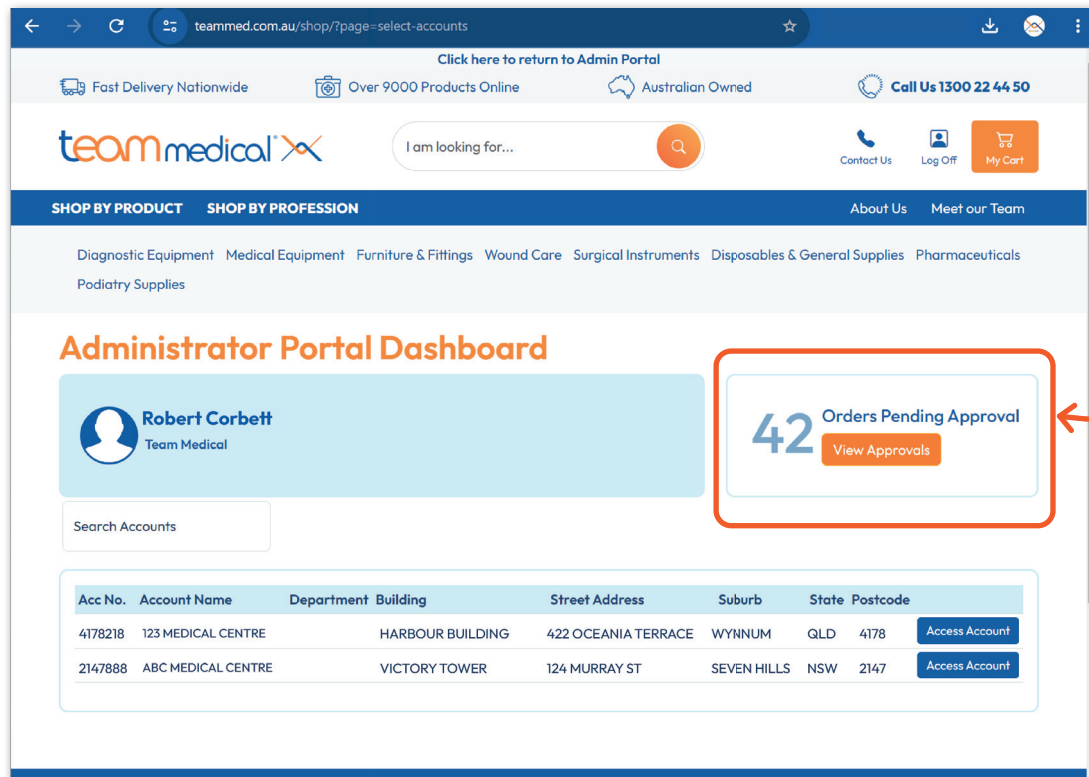
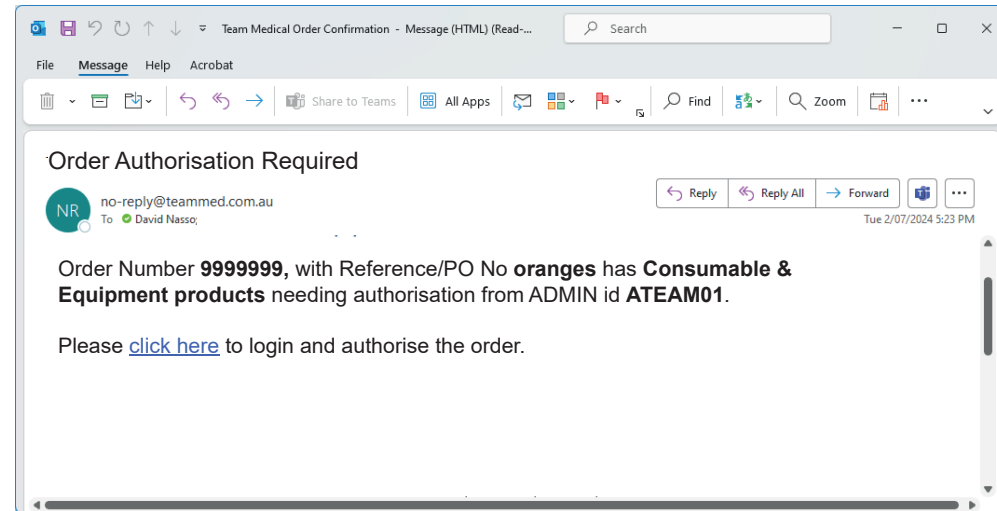
Log in using your Admin User credentials.

**Hint:** all admin usernames begin with an "A", for example:

**Username:** A012548

**Password:** Oranges0125

Usernames and passwords are case sensitive.



## Accessing the Order Approvals Page

On the top right of the Administrator Portal Dashboard, under the main website menu bar, it will outline how many pending order approvals you have. Click on the view approvals buttons will take you to your order approvals page.

## Navigating the Order Approvals Page

The Order Approvals Page features a table outlining the basic details of orders that require approval and orders that historically required approval. The table includes all approval orders for the Customer Accounts you are the Admin User for.

For ease of viewing, tabs segment the table by approval status:

- **Pending:** Orders awaiting review for approval
- **Approved:** Orders that have been approved for processing
- **Disapproved:** Orders that have been not been approved for processing

### Viewing Order Details

To view the details click on the order number. This is also how you access the order to complete the approval process.

**Pending Approval #1165031**

**Order Details**

Account Number: 6090031  
 Account Name: TOM VRIENS BP  
 Reference / PO Number: Alec  
 Ordered by email: tom.vriens@teammed.com.au  
 Contact name: Alec  
 Order comments:

Date Submitted: 06/07/2020  
 Delivery Address:  
 BP MEDICAL  
 62 BOULDER ROAD  
 MALAGA, WA, 6090

**2 Items in your Cart**

Code	Description	Unit	Qty	Available	Your \$	GST	Total	
SUTSM604	Tubular gauze size 5-6	ROLL	1		\$26.02	\$2.60	\$28.62	Remove
SNCOS75NS	CutSoft Gauze Squares 7.5 x 7.5cm Non-Sterile 8ply	PKT/100	2		\$4.16	\$0.42	\$9.15	Remove

**Freight**  
 For FREE freight increase your item value by \$15.00

Freight	\$15.00	\$1.50	\$16.50
Total GST			\$4.94
<b>Total</b>			<b>\$54.27</b>

Approved/Disapproved By?

Approval Comments?

[Exit](#) [Update Quantities](#) [Disapprove](#) [Approve](#)

To return to the Order Approvals Page click on the "Exit" button.

**Order Approvals**

Pending Approved Disapproved [Back](#)

Order No.	Order Date	Customer Ref/PO	Net Value	Account No.	Account Name	Department	Street Address	Suburb	Post State Code	Centre
1165031	06/07/2020	Alec	\$50.27	6090031	TOM VRIENS BP	BP MEDICAL	62 BOULDER ROAD	MALAGA	WA 6090	
1457782	29/10/2021	test	\$367.20	2158086	TEAM MED SUPPLIES	TEAM MED	167 PROSPECT HIGHWAY	SEVEN HILLS	NSW 2147	
1662871	19/08/2022	test	\$0.40	2158086	TEAM MED SUPPLIES	TEAM MED	167 PROSPECT HIGHWAY	SEVEN HILLS	NSW 2147	
1662873	19/08/2022	test	\$0.90	2158086	TEAM MED SUPPLIES	TEAM MED	167 PROSPECT HIGHWAY	SEVEN HILLS	NSW 2147	
1707418	28/10/2022	test	\$0.40	2158086	TEAM MED SUPPLIES	TEAM MED	167 PROSPECT HIGHWAY	SEVEN HILLS	NSW 2147	

### Returning to the Administrator Portal Dashboard

To return to the Administrator Portal Dashboard, click on the "Back" button.



## Amending a Pending Order

From the order detail page, you can make changes to a pending order such as editing product quantities.

### Changing the Purchase Order Number or Order Reference

Click on the edit link next to reference.

Pending Approval #1165031

#### Order Details

Account Number: 6090031

Account Name: TOM VRIENS BP

Reference / PO Number: Alec [Edit](#)

Ordered by email: tom.vriens@teammed.com.au

Contact name: Alec

Order comments:

Date Submitted: 06/07/2020

Delivery Address:

BP MEDICAL

, 62 BOULDER ROAD

MALAGA, WA, 6090

Type the new Purchase Order Number/Order Reference into the box that appears. This will be saved when you approve the order. Clicking "cancel" will revert to the previous Purchase Order Number/Order Reference.

Pending Approval #1165031

#### Order Details

Account Number: 6090031

Account Name: TOM VRIENS BP

Reference / PO Number: 2591869 [Cancel](#)

New reference will be saved upon Approval.

Ordered by email: tom.vriens@teammed.com.au

Contact name: Alec

Order comments:

Date Submitted: 06/07/2020

Delivery Address:

BP MEDICAL

, 62 BOULDER ROAD

MALAGA, WA, 6090

Reference / PO Number:

2591869

[Cancel](#)

New reference will be saved upon Approval.

### Changing the Product Quantities

In the QTY field enter the new order quantity. Quantities can only be reduced, not increased.

To remove a product from the order, click the remove link, on the line for the relevant product.

Once you've finished making changes, click on the "Update Quantities" button. If you don't complete this step, your changes will not be saved.

2 Items in your Cart

Code	Description	Unit	Qty	Available	Your \$	GST	Total	
SUTSM604	Tubular gauze size 5-6	ROLL	50		\$22.15	\$2.22	\$1,218.25	<a href="#">Remove</a>
SNCGS7SNS	Cutisoft Gauze Squares 7.5 x 7.5cm Non-Sterile 8ply	PKT/100	10		\$4.16	\$0.42	\$45.76	<a href="#">Remove</a>

Total GST

\$115.20

Total

\$1,264.01

Approved/Disapproved By?

Approval Comments?

[Exit](#) [Update Quantities](#)

[Disapprove](#) [Approve](#)

ending Approval #1165031 | X

teammed.com.au/shop/?page=auth\_approval

as 6090031 | Click here to return to Admin Portal

Fast Delivery Nationwide Over 9000 Products Online Australian Owned Call Us 1300 22 44 50

Logged in as Customer 6090031

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I am looking for...

Contact Us Log Off My Cart

Account Number: 6090031  
Account Name: TOM VRIENS BP  
Reference / PO Number: Alec [Edit](#)  
Ordered by email: tom.vriens@teammed.com.au  
Contact name: Alec  
Order comments:

Date Submitted: 06/07/2020  
Delivery Address:  
BP MEDICAL  
, 62 BOULDER ROAD  
MALAGA, WA, 6090

2 Items in your Cart

Code	Description	Unit	Qty	Available	Your \$	GST	Total	
SUTSM604	Tubular gauze size 5-6	ROLL	50		\$22.15	\$2.22	\$1,218.25	<a href="#">Remove</a>
SNCG575NS	Cutisoft Gauze Squares 7.5 x 7.5cm Non-Sterile 8ply	PKT/100	10		\$4.16	\$0.42	\$45.76	<a href="#">Remove</a>

Total GST	\$115.20
Total	\$1,264.01

Approved/Disapproved By?

Approval Comments?

[Exit](#) [Update Quantities](#) [Disapprove](#) [Approve](#)

## Approving or Disapproving an Order

Enter your name in "Approved/Disapproved By" box, this is a mandatory field.

If relevant, enter a comment into the "Approval Comments" box. If you have a multi-level approval system, this could be a comment for the next level of approval. Some customers use this to add details about products that have been changed from the initial ordering stage.

To approve the order click on the green "Approve" button.

Approve

A pop-up will appear, click on the "OK" button to confirm the approval.

www.teammed.com.au says

Are you sure you want to Approve this order?

OK

Cancel

To disapprove the order click on the red "Disapprove" button.

Disapprove

A pop-up will appear, click on the "OK" button to confirm the disapproval.

www.teammed.com.au says

Are you sure you want to Disapprove this order?

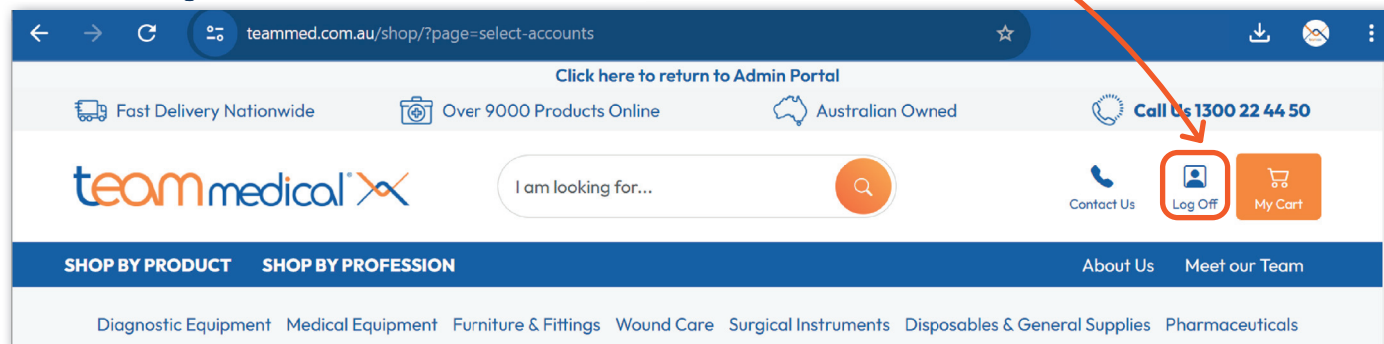
OK

Cancel

## Logging Out

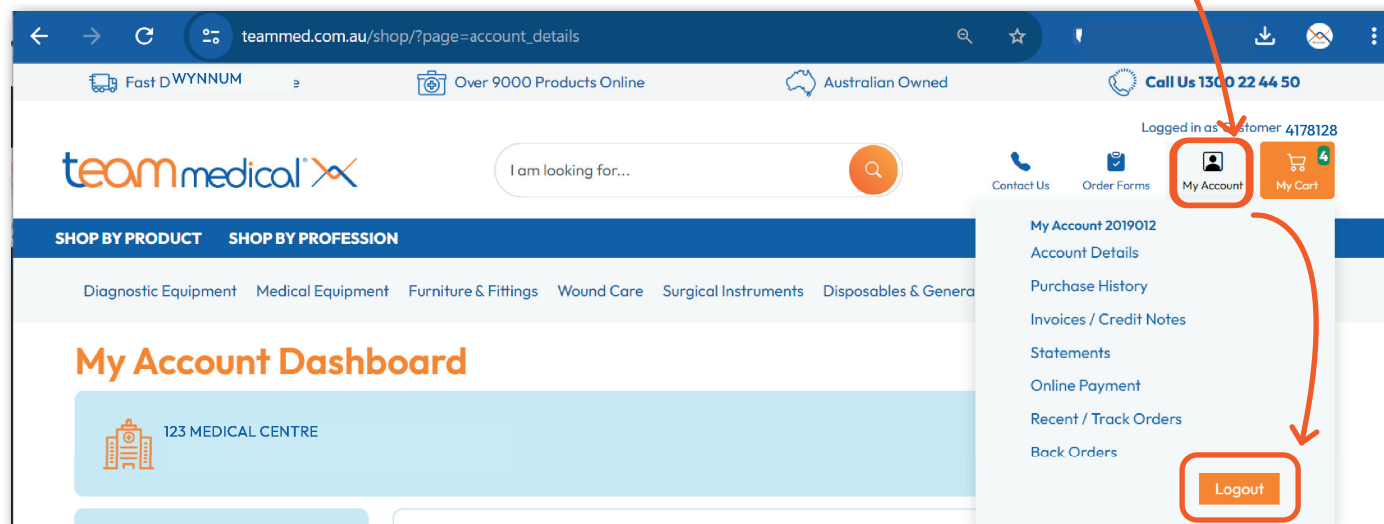
### Admin User

Click on the Log Off icon, located above the menu bar.



### Standard User

Click on the My Account icon, located above the menu bar. Then click on the logout button.



If assistance is required, please contact your Account Manager or our Customer Service Centre on 1300 22 44 50 during business hours.