



# ESM Purchase™ User Profile Reference Guide



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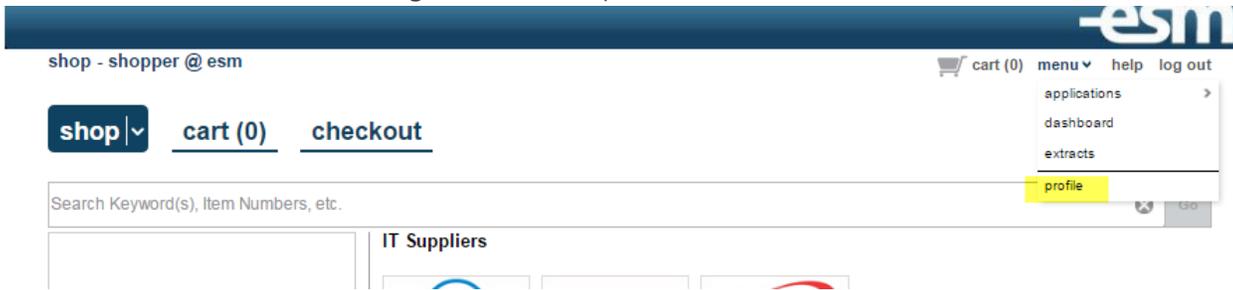
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## ESM Purchase™ User Profile

This document provides a condensed overview of the User Profile options. It will demonstrate with short text descriptions supported by screen shots for each step explained.

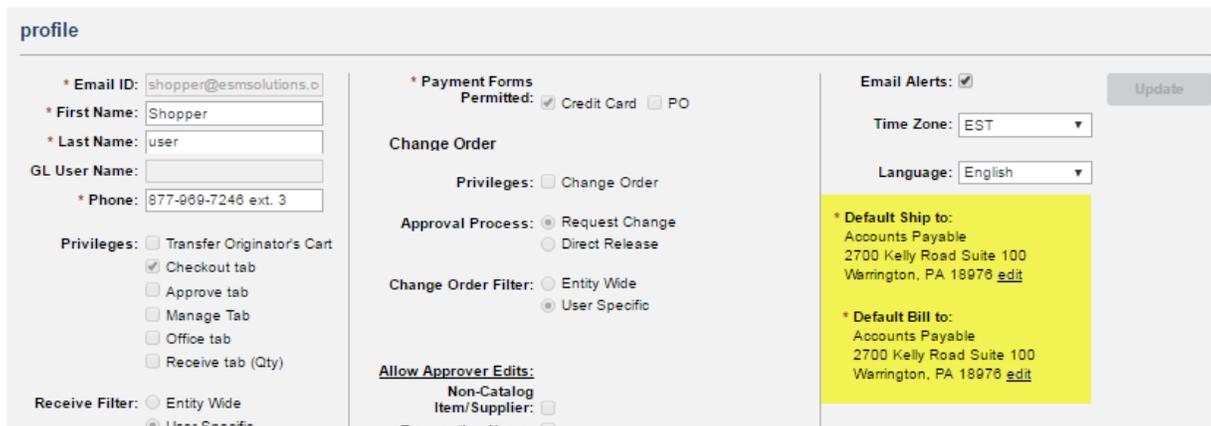
### Accessing the Profile

Users can access their Profile using the Menu drop-down.



### Changing Default Bill-to and Ship-to Locations

Users can select Edit to modify the default locations.



## Updating User Information

Users can update First Name, Last Name, Phone, Email Alerts and Time Zone.

profile

<p>* Email ID: <input type="text" value="shopper@esmsolutions.c"/></p> <p>* First Name: <input type="text" value="Shopper"/></p> <p>* Last Name: <input type="text" value="user"/></p> <p>GL User Name: <input type="text"/></p> <p>* Phone: <input type="text" value="877-889-7248 ext. 3"/></p> <p>Privileges:</p> <ul style="list-style-type: none"><li><input type="checkbox"/> Transfer Originator's Cart</li><li><input checked="" type="checkbox"/> Checkout tab</li><li><input type="checkbox"/> Approve tab</li><li><input type="checkbox"/> Manage Tab</li><li><input type="checkbox"/> Office tab</li><li><input type="checkbox"/> Receive tab (Qty)</li></ul> <p>Receive Filter:</p> <ul style="list-style-type: none"><li><input type="checkbox"/> Entity Wide</li><li><input checked="" type="checkbox"/> User Specific</li></ul> <p>Menu Options:</p> <ul style="list-style-type: none"><li><input type="checkbox"/> Order Summary</li><li><input type="checkbox"/> Reporting</li><li><input type="checkbox"/> Admin</li></ul>	<p>* Payment Forms Permitted: <input checked="" type="checkbox"/> Credit Card <input type="checkbox"/> PO</p> <p>Change Order</p> <p>Privileges: <input type="checkbox"/> Change Order</p> <p>Approval Process:</p> <ul style="list-style-type: none"><li><input checked="" type="radio"/> Request Change</li><li><input type="radio"/> Direct Release</li></ul> <p>Change Order Filter:</p> <ul style="list-style-type: none"><li><input type="radio"/> Entity Wide</li><li><input checked="" type="radio"/> User Specific</li></ul> <p><u>Allow Approver Edits:</u></p> <ul style="list-style-type: none"><li>Non-Catalog Item/Supplier: <input type="checkbox"/></li><li>Transaction Name: <input type="checkbox"/></li><li>Payment Form: <input type="checkbox"/></li><li>Purchase Order #: <input type="checkbox"/></li><li>Release Method: <input type="checkbox"/></li><li>Order Type: <input type="checkbox"/></li><li>Notes/Attachments: <input type="checkbox"/></li><li>Fiscal Date: <input type="checkbox"/></li><li>Aux Fields 1 &amp; 2: <input type="checkbox"/></li><li>Need By Date: <input type="checkbox"/></li><li>Account Code: <input type="checkbox"/></li><li>Quantity: <input type="checkbox"/></li><li>Commodity Code: <input type="checkbox"/></li><li>Tax Codes: <input type="checkbox"/></li></ul> <p>Create Non-Catalog Suppliers: <input type="checkbox"/></p> <p>Order Summary Edit: <input type="checkbox"/></p> <p>Edit Cart Transferred To: <input type="checkbox"/></p> <p>Cart Transferred To:</p>	<p>Email Alerts: <input checked="" type="checkbox"/></p> <p>Time Zone: <input type="text" value="EST"/></p> <p>Language: <input type="text" value="English"/></p> <p>* Default Ship to: Accounts Payable 2700 Kelly Road Suite 100 Warrington, PA 18978 <a href="#">edit</a></p> <p>* Default Bill to: Accounts Payable 2700 Kelly Road Suite 100 Warrington, PA 18978 <a href="#">edit</a></p> <p><input type="button" value="Update"/></p>
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Users can also review the Privileges assigned by the System Administrator.

## Edit Transfer Cart Recipient

Depending on the entity's configuration, users can edit the default Transfer Cart recipient.

Tax Codes:

Create Non-Catalog Suppliers:

Order Summary Edit:

Edit Cart Transferred To:

Cart Transferred To: Shopper user [edit](#)

## Delegation

Depending on the entity's configurations, users can assign Delegates to approve in their absence. Alternatively, the System Administrator determines the user's delegate.

Select another approver from the Delegate Email ID drop-down and determine if the Delegate Status is Active.

The screenshot shows a 'profile' configuration page with the following fields and options:

- \* Email ID:** entity.admin@esmsolution
- \* First Name:** System
- \* Last Name:** Admin
- GL User Name:** (empty)
- \* Phone:** 8779697246
- Privileges:**
  - Transfer Originator's Cart
  - Checkout tab
  - Approve tab
  - Manage Tab
  - Office tab
  - Receive tab (Qty)
- Receive Filter:**
  - Entity Wide
  - User Specific
- Menu Options:**
  - Order Summary
  - Reporting
  - Admin
- Delegate Email ID:** shopper@esmsolutio (dropdown menu)
- Delegate Status:**
  - Active
  - Inactive

Both users will receive the transaction for approval when the Delegation Status is Active.