

Document Actions

Approve, Return, Reject and
other options

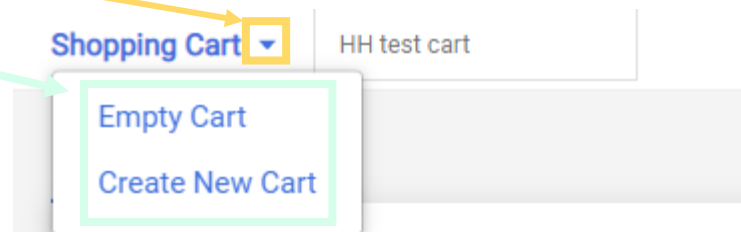
Cart, Requisition, PO, Invoices

Cart Document Actions



For Optional Document Actions in the **Cart** click:

- Down Arrow
- Choose option desired

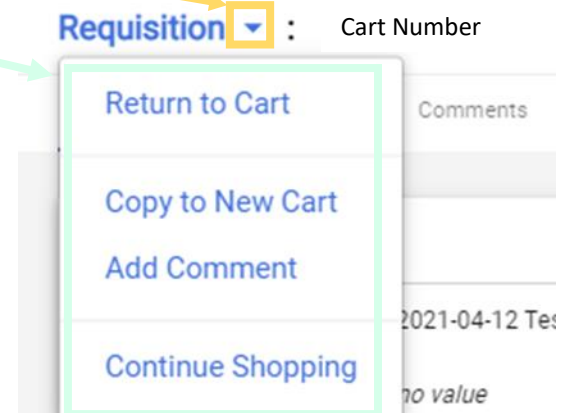


Proceed to Checkout Document Actions

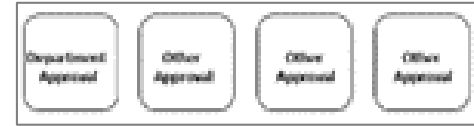


For Optional Document Actions during **Proceed to Checkout** click:

- Down Arrow
- Choose desired option



Requisition Workflow Document Actions



1 - For Optional Document Actions in the

Requisition Workflow click:

- Down Arrow
- Choose desired option

Begin by clicking on **Assign to Myself**

Requisition  : Requisition Number

A screenshot of a dropdown menu for document actions. The menu is enclosed in a light green border. The first item, 'Assign to myself', is highlighted with a blue border. Other items include 'Approve/Complete Step & Show Next', 'Approve/Complete Step', 'Copy to New Cart', 'Add Comment', 'Add Notes to History', 'Non-Catalog Quick Order', 'View My Orders (Last 90 Days)', and 'Continue Shopping'.

2 – After Clicking **Assign to Myself** for **Additional** Optional

Document Actions in the **Requisition Workflow** click:

- Down Arrow
- Choose desired option

Requisition  : Requisition Number

A screenshot of a dropdown menu for document actions, similar to the first one but with a different set of options. The menu is enclosed in a light green border. The second item, 'Approve/Complete Step', is highlighted with a grey background. Other items include 'Approve/Complete & Show Next', 'Return to Shared Folder', 'Place on Hold', 'Return to Requisitioner', 'Forward to ...', 'Copy to New Cart', 'Add Comment', 'Add Notes to History', 'Reject Requisition', 'Non-Catalog Quick Order', 'View My Orders (Last 90 Days)', and 'Continue Shopping'.

Purchase Order (PO) Document Actions



For Optional **Purchase Order (PO)** Document Actions click:

- Down Arrow
- Choose desired option

Purchase Order ▾ : PO Number **Revision 0**

- Add Comment
- Add Notes to History
- Create Quantity Receipt
- Create Cost Receipt
- Print Fax Version
- Soft Close PO
- Close PO

1 Confirmations


Invoice Document Actions



For Optional **Invoiced** Document Actions click:

- Down Arrow
- Choose desired option

Begin by clicking on **Assign** for additional invoicing options

Invoice  : Invoice Number

- Assign
- Approve/Complete Step & Show Next
- Approve/Complete Step
- Add Comment
- Add Notes to History