

# Setting Up Order Approvals in McKesson SupplyManager<sup>SM</sup>

McKesson SupplyManager<sup>SM</sup> approval rules help control spend and make sure orders are compliant. Approval rules let you set up a review process of all orders placed at any of your locations. Approvers are pre-assigned in SupplyManager.

- 1 After you have selected products and move on to finalize your cart, you will see this message if your order requires approval.

The screenshot shows the McKesson SupplyManager interface. At the top, there is a search bar and navigation links for 'Shop Products', 'Orders', 'Reports', and 'Resources'. A notification banner at the top left displays an 'Approval Alert - You have exceeded your order spending limit of \$0.00 by \$27.63'. Below this, the cart contains two items: a gown and a glove. To the right, an 'ORDER SUMMARY' box shows a subtotal of \$27.63 and a 'CONTINUE TO CHECKOUT' button. Below the cart, an 'ACCOUNT SUMMARY' section displays the billing account information for 'MCKESSON PHYSICIAN OFFICE'.

- 2 After you select “Continue to Checkout,” you will see this alert a second time. Select your approver in the drop down on the right, if you have more than one. Below that, you can add any notes or comments you would like your approver to see.

The screenshot shows the 'Secure Checkout' page. A progress bar at the top indicates the current stage is 'Checkout'. A notification banner at the top left repeats the 'Approval Alert'. Below the alert, there is a text area for notes with the prompt 'Would you like to include a note? (optional)'. To the right, a dropdown menu for 'Approver:' is open, showing a list of names. Below the dropdown, there is a 'Characters Left: 255' indicator. At the bottom, there are sections for 'Billing Account' (with a 'SWITCH' button), 'Purchase Order Name' (with a text input field), and 'Blanket Purchase Order' (with a dropdown menu).

3

Finally, you are ready to “Submit for Approval.”

**Shipping Destination**  
 #225472  
 MCKESSON PHYSICIAN OFFICE-DC 03  
 \*\*PRICING FOR DEMO ONLY\*\*  
 1405 N. CHOUTEAU  
 KANSAS CITY, MO 64120

**SWITCH**

**Add a note to your packing slip**  
 Notes are not seen by delivery drivers, customer service, or warehouse  
 ▶ Add a Note

Okay. We've got everything we need.  
 2 In stock items - ship from your warehouse network

Cart Number: 1177010  
 Items (2) \$27.63  
 Subtotal \$27.63

**Estimated Total\* \$27.63**

**SUBMIT FOR APPROVAL**

\* Taxes and Shipping & Handling are estimated

4

You may view all orders you submitted for approval at any time by selecting “Your Carts.”

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**MCKESSON** What can we help you find? #61884 MCKESSON PHYSICIAN OFFICE

Shop Products Orders Reports Resources

**Carts You Submitted for Approval**

Your Carts  
 Approve Orders  
 Email Notifications  
 Contact Support  
 Log Out

Cart #	Lines	Shipping Destination	Submitter	Approver	
1176924	1 Items	#225472 MCKESSON PHYSICIAN OFFICE-DC 03			
1176950	1 Items	#225472 MCKESSON PHYSICIAN OFFICE-DC 03			2018/10/26 11:55 AM EDT
1176926	1 Items	#225472 MCKESSON PHYSICIAN OFFICE-DC 03			2018/10/26 11:07 AM EDT

### How Are Orders Approved?

1

After your order is submitted, your approver receives an email asking them to approve or reject your order.

McKesson Medical-Surgical

Cart # 1176926 Needs your Approval

**Approve** **Reject**

**Currently Needs Approval**

**Reason**  
 You have exceeded your order spending limit of \$20.00 by \$25.08

PO	Cart #	Created By	Submitted	Total
60000000000000000000	1176926	Shawn Beaudin	10/26/18 7:11:08 AM	\$34.70

**Account #** 00000000000000000000 **Shipping To#** 00000000000000000000

Item #	Description	Mfg #	UOM	Price	Qty	Total
398	In stock, ships from your local warehouse	305125	BX	\$3.47	10	\$38.08

**Total: \$34.70**

2

To see all orders that need approval, select “**Approve Orders**” in SupplyManager.

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Shop Products Orders Reports Resources

### Carts Needing Your Approval

Cart #	Lines	Shipping Destination	Submitter	Approver
1176924	1 Items	#225472 MCKESSON PHYSICIAN OFFICE-DC 03	CARISIMONE	SIMONEAPPROVER
1176926	1 Items	#225472 MCKESSON PHYSICIAN OFFICE-DC 03	CARISIMONE	CARILHOWARDSIMONE

2018/10/26 11:07 AM EDT

3

Once an approver selects a cart to modify, they may reject, edit or approve the order.

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Shop Products Orders Reports Resources

**Approval Needed - CARISIMONE needs your approval on the rule below.**

1. You have exceeded your order spending limit of \$0.00 by \$9.32

Note: jdijgjalkj

REJECT

All Items (1) Pending Availability (1) Quick Add

**XYLOCAINE, MDV 1% 50ML (25/CT)9APPPH**

Backordered, 0 stocked, balance ships as available Find Alternatives

1 x \$9.32 per EA/1 \$9.32

Remove Edit

**ORDER SUMMARY**

Cart Number: 1176924  
Items (1) \$9.32  
Subtotal \$9.32

Estimated Total\* \$9.32

APPROVE THIS ORDER

\* Taxes and Shipping & Handling are estimated

**ACCOUNT SUMMARY**

Billing Account

#61884  
MCKESSON PHYSICIAN OFFICE  
\*SUPPLYMANAGER TEST ACCOUNT SWITCH



If you need help or more information, please contact the SupplyManager Help Desk at 800.422.0280, Option 1.