

## 1 Create Budgets

- A. Login
- B. Click **My Account**
- C. Expand (+) **Site Administration**
- D. Click **Budgets**
- E. On the **Budgets** page, click **Create New Budget** to begin
- F. Enter criteria for any or all selections
- G. Select **Control Policies**
- H. Click **Submit**

**Navigation Menu:**

- My Account
- Practice Analysis Tool
- Statements & Payments
- Orders
- Reports
- My Profile
- Site Administration
  - Account Administration Contacts
  - Advanced Account Management
  - User Profiles
  - Office Locations
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  - Messaging Center
- Custom Order Messages
- Controlled Substance Info
- My Practice PRIVILEGES
- LOGOUT

**Budgets Table:**

Shipping Account #	Office Nickname	Shipping Address	Maximum Order Total	Minimum Order Total	Unit Item Price	Current Monthly Budget	Number of Products with Quantity Limit	Remaining Monthly Budget
3153261	Test Acct One	526 Congaree Rd Greenville, SC 296073516	N/A	\$10.00	N/A	N/A	N/A	View/Modify

**Form Sections:**

- MINIMUM PER ORDER TOTAL:** Includes a text input for 'Minimum Per Order Total' and radio buttons for control policies.
- MAXIMUM PER ORDER TOTAL:** Includes a text input for 'Maximum Per Order Total' and radio buttons for control policies.
- MAXIMUM MONTHLY TOTAL:** Includes radio buttons for 'No Monthly Budget', 'Maximum Monthly Total', and 'Variable Maximum Monthly Total'.
- UNIT ITEM PRICE:** Includes a text input for 'Unit Item Price' and radio buttons for control policies.
- QUANTITY LIMITS ON INDIVIDUAL ITEMS FOR ORDER:** Includes a table with columns for 'Item Code', 'Qty', and 'ADD'.

**Buttons:** 'CREATE NEW BUDGET' (top right of table), 'SUBMIT' (bottom right of page).



## 2

### View/Modify

- A. Log-in
- B. Click **My Account**
- C. Expand (+) **Site Administration**
- D. Click **Budgets**
- E. Click View/Modify

[Home](#) / [My Account](#) / **Budgets**



The following locations currently have a budget applied. To view the current monthly budget usage, click the Remaining Monthly Budget amount for the desired location.

[Monthly Budget Usage](#)

BUDGETS: (4)      SORT BY: Shipping Account #      [CREATE NEW BUDGET](#)

Shipping Account #	Office Nickname	Shipping Address	Maximum Order Total	Minimum Order Total	Unit Item Price	Current Monthly Budget	Number of Products with Quantity Limit	Remaining Monthly Budget	
1623781	Sea Mar CHC	1040 S Henderson St Seattle, WA 981084720	\$1,000.00	\$200.00	N/A	N/A	N/A		<a href="#">View/Modify</a>
2802624	Bellingham Medical 514	4455 Cardata Pkwy Bellingham, WA 982268037	\$1,000.00	\$200.00	N/A	N/A	N/A		<a href="#">View/Modify</a>
2802630	Everson Medical 515	6884 Hannegan Rd Everson, WA 982479637	\$1,000.00	\$200.00	N/A	N/A	N/A		<a href="#">View/Modify</a>
2802680	Mt Vernon Medical 512	1400 N Laventure Rd Mount Vernon, WA 982732766	\$1,000.00	\$200.00	N/A	N/A	N/A		<a href="#">View/Modify</a>

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## Modify Budget

- A. Modify the amount of the budget, unit item price or quantity limits on individual items for order.
- B. Modify the control policies.
- C. Click **Submit** and **Apply to Additional** Locations.
- D. Check the box for locations you want to add or uncheck the box if you want to remove.
- E. Click **Apply**, a notification will appear that the budget has been applied to the following locations

### BUDGET ALLOCATIONS & CONTROL POLICIES:

- Minimum Per Order Total:
- Maximum Per Order Total:
- Current Maximum Monthly Total:
- Unit Item Price:
- Number of Products with Quantity Limit :
- Merge existing item limits with new items limits

### LOCATIONS: (1)

<input checked="" type="checkbox"/>	Account #	Office NickName
<input checked="" type="checkbox"/>	3153270	Test Acct Three

**APPLY**

### MINIMUM PER ORDER TOTAL

Minimum Per Order Total  Numbers only

#### Control Policies:

Choose a policy for this location - when an order is below the set minimum order total:

- Allow the order to be submitted and processed despite the minimum order total.
- Send emails to budgeter(s) to alert of minimum order total
- Submit the order to approver(s) before processing the order.
- Do not allow the order to be submitted until the order complies with minimum order total.

### MAXIMUM PER ORDER TOTAL

Maximum Per Order Total  Numbers only

#### Control Policies:

Choose a policy for this location - when an order maximum total is reached or exceeded.

- Allow the order to be submitted and processed despite the budget overage.
- Send emails to budgeter(s) to alert of overage
- Submit the order to approver(s) before processing the order.
- Do not allow the order to be submitted until the order complies with the budget.

### UNIT ITEM PRICE

Unit Item Price  Numbers only

#### Control Policies:

Choose a policy for this location - when a Unit Item Price of an item is reached or exceeded.

- Allow the order to be submitted and processed despite the Unit Item Price.
- Send emails to budgeter(s) to alert Unit Item Price
- Submit the order to approver(s) before processing the order.
- Do not allow the order to be submitted until the order complies with the Unit Item Price.

### QUANTITY LIMITS ON INDIVIDUAL ITEMS FOR ORDER

Item Code:  Qty:  **ADD**

#### PRODUCTS: 1

Item Code	Description	Qty	EA	
8128837	Key Chain Scanner USB Ea Ea	<input type="text" value="2"/>	<input type="text" value="EA"/>	

#### Control Policies:

Choose a policy for this location - when a Quantity Limit of an item is reached or exceeded.

- Allow the order to be submitted and processed despite the Quantity Limit
- Send emails to budgeter(s) to alert of Quantity Limit
- Submit the order to approver(s) before processing the order.
- Do not allow the order to be submitted until the order complies with the Quantity Limit.

**SUBMIT AND APPLY TO ADDITIONAL LOCATIONS**

**DELETE**

**SUBMIT**

