

Understanding the Explanations in the Purchasing Groups (Customer Groups) Section of your Order Management System

Each of the explanation fields in the Purchasing Groups (Customer Groups) preferences (Customers/Preferences/Customer Groups/Explanations) contains default text designed to apply to most merchants. We anticipate that very few merchants will want to make changes. However, some merchants may want to modify the text specific to their organization and process.

1. The **CUSTOMER GROUPS EXPLANATION** uses keywords to ensure that Masters, Approvers and Requisitioners each see a different version of this explanation on their account pages.

a) This is the **CUSTOMER GROUPS EXPLANATION** default text that Masters see on their account pages: (there may be additional blue links depending upon the merchant's selections in Customers / Preferences):

Customer Groups

About Groups: Purchasing groups can be created by those designated as Group Masters in which the Member orders will be paid by the Group Master and will roll up to the Master for Group order reporting purposes. The Master may also require that Member orders be approved by one or more designated Approvers. The Master designates which Members are Requisitioners (may only place orders) and which Members are Approvers (may place orders and approve orders placed by others.)

- Manage Groups and Members
- Group Orders and Subscriptions
- Group Pending Orders Needing Approval
- I No Longer Wish to be a Master Customer

CUSTOMER GROUPS EXPLANATION TEXT - DEFAULT FOR MASTERS

b) This is the **CUSTOMER GROUPS EXPLANATION** default text that Approvers see on their account pages. Note that the About Groups paragraph is the same as for Masters, but there is an additional line indicating that this person is an Approver: (there may be additional blue links depending upon the merchant's selections in Customers / Preferences):

Group Membership

About Groups: Purchasing groups can be created by those designated as Group Masters in which the Member orders will be paid by the Group Master and will roll up to the Master for Group order reporting purposes. The Master may also require that Member orders be approved by one or more designated Approvers. The Master designates which Members are Requisitioners (may only place orders) and which Members are Approvers (may place orders and approve orders placed by others.)

You are an **Approver** in the Group **group 1** organized by **Pamela TopperMaster** (ptopper@nexternal.com).

- Group Orders
- Group Pending Orders Needing Approval
- I Wish to Leave the Group

CUSTOMER GROUPS EXPLANATION TEXT - DEFAULT FOR APPROVERS

c) This is the **CUSTOMER GROUPS EXPLANATION** default text that Requisitioners see on their account pages. Note it is the same as the Approver except the person is being

designated as a Requisitioner in the extra line: (there may be additional blue links depending upon the merchant’s selections in Customers / Preferences):

Group Membership

About Groups: Purchasing groups can be created by those designated as Group Masters in which the Member orders will be paid by the Group Master and will roll up to the Master for Group order reporting purposes. The Master may also require that Member orders be approved by one or more designated Approvers. The Master designates which Members are Requisitioners (may only place orders) and which Members are Approvers (may place orders and approve orders placed by others.)

You are a **Requisitioner** in the Group **group 2** organized by **Pamela TopperMaster** (ptopper@nexternal.com).

- [I Wish to Leave the Group](#)

CUSTOMER GROUPS EXPLANATION TEXT - DEFAULT FOR REQUISITIONERS

2. When Masters click the blue link (seen above in 1.a) to “Manage Groups and Members”, they see the sections below on their account pages. These sections contain the **MANAGE GROUPS EXPLANATION** default text and the **MANAGE MEMBERS EXPLANATION** default text.

Shopping > Account > Manage Groups and Members

Customer Groups + Add

As a Master you may add and delete Groups and Members, designate Member Roles, establish order thresholds which require approvals, and indicate how any approvals are required.

<p>group 1 Payment Method: Invoice Requires approval for orders of at least \$50.00 1 Requisitioner 1 Approver Edit This Group Delete This Group</p>	<p>group 2 Payment Method: Saved Credit Card You must add at least one unexpired Saved Credit Card to your account for this Payment Method to be valid. No approval required 2 Requisitioners 0 Approvers Edit This Group Delete This Group</p>	<p>MANAGE GROUPS EXPLANATION DEFAULT TEXT</p>
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Group Members + Add

Please note that a person can be a Member of only one Group.

MANAGE MEMBERS EXPLANATION DEFAULT TEXT

Refine by:

Show:
 All Members
 Full Members
 Pending Members

Member	Role in Group	Actions
Approver, Alex (ABC Co.) alex.approver@gmail.com	Approver in group 1	Edit Remove
Requisitioner, Randy (ABC Co.) randy.requisitioner@gmail.com	Requisitioner in group 2	Edit Remove
Requisitioner, Rudy (ABC Co.) rudy.requisitioner@gmail.com	Requisitioner in group 2	Edit Remove
SubCustomer, Suzy (ABC Co.) marketina@icloud.com	Requisitioner in group 1	Edit Remove

3. When Masters use the toggle at the top of the screenshot in section 2. above to toggle to “Group Orders”, they see the following **GROUP ORDERS EXPLANATION** text above the list of orders that do not require approval. If you are offering subscriptions and there are subscription orders, the top dropdown will say “Group Orders and Subscriptions” and the **GROUP SUBSCRIPTIONS EXPLANATION** text will appear above subscription orders:

Shopping > Account | Group Orders and Subscriptions

Group Orders

Below are all Group orders that are not in a pending state. **GROUP ORDERS EXPLANATION TEXT**

To see the list of orders pending approval, or to manage your Members or Groups, please use the pull-down toggle above.

Order No	Order Date	Ordered By	Order Status	Billing Status	Amount
102313	3/30/2020	Randy Requisitioner, ABC Co. randy.requisitioner@gmail.com	Unshipped	Unbilled	\$52.80
102311	3/30/2020	Suzy SubCustomer, ABC Co marketing@icloud.com	Unshipped	Unbilled	\$49.00

Group Subscriptions

Below are all subscription Group orders (auto-recurring orders). **GROUP SUBSCRIPTIONS EXPLANATION TEXT**

To see the list of subscription orders pending approval, or to manage your Members or Groups, please use the pull-down toggle above.

Product	Qty	Next	Subscription No	Ordered By	Status
WIDGET	1	4/30/2020	51151	Randy Requisitioner, ABC Co. randy.requisitioner@gmail.com	Active

- When Masters use the toggle at the top of the screenshot above to toggle to “Group Pending Orders”, they see this **GROUP PENDING EXPLANATION** text above the list of orders that require approval:

Shopping > Account | Group Pending Orders Needing Approval

Group Pending Orders Needing Approval

Below is the list of all Group orders that are pending approval. **GROUP PENDING EXPLANATION TEXT**

To see the list of approved orders or to manage your Members or Groups, please use the pull-down toggle above.

Order No	Order Date	Ordered By	Status	Customer Group	Total Price
102312	3/30/2020	Alex Approver, ABC Co. alex.approver@gmail.com	1 Approval Needed	group 1	\$158.39
102310	3/30/2020	Suzy SubCustomer, ABC Co marketing@icloud.com	1 Approval Needed	group 1	\$490.00