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Dollar Rules



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Dollar Rules

QuikTips offers a systematic guide to design Dollar Approval and Limit Rules in order to apply customized purchasing parameters for requisitioners to meet your organization's strategic sourcing goals. Registered Administrators and designated SuperUsers can use the following features in order to specify:

- Dollar Approval Rules
- Dollar Limit Rules

What Are "Dollar Approval Rules"?

Dollar Approval Rules ensure that (1) orders exceeding the dollar limit you set or (2) include a product that exceeds a dollar value you define are approved before submission to Fisher. There is no limit to the number of rules you can establish. You can create, delete, and revise these rules, then apply them to online purchasing practices on a user-by-user basis.

Why Use Dollar Approval Rules?

Dollar approval rules facilitate spending authority by order and by product. This function ensures that your approval and other business rules and practices are enforced. It will also save you a lot of "hands-on" administrative time and effort reviewing requisitions.

What Are "Dollar Limit Rules"?

Dollar Limit Rules prohibit purchases that exceed the dollar limit you set for unit price and/or requisition total. You can create, delete, and revise rules, then apply them to online purchasing practices on a user-by-user basis.

Why Use Dollar Limit Rules?

This function enables you to manage your subordinates' spending limits and ensure that your company business rules and practices are enforced. For example, you may choose to restrict online capital purchases. You can establish a dollar limit by line item, which will prevent the user from placing that item in their cart. This function will save you a lot of "hands-on" administrative time and effort reviewing online requisitions.

Creating a Dollar Approval Rule

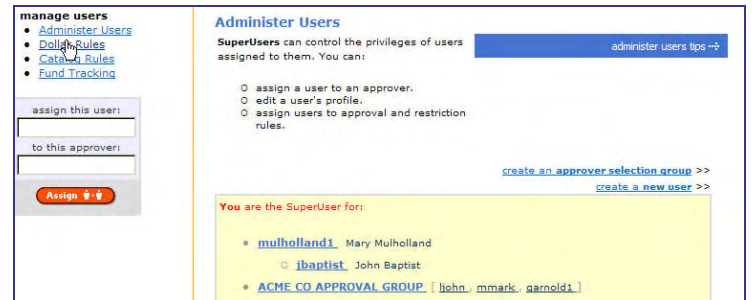
1. Click on the **Manage Users** link after logging in to the site.

Note: Only a registered Administrator/SuperUser can create Dollar Approval Rules.



Manage Users Link

2. Click on **Dollar Rules** found on the left hand side of the page.



Dollar Rules Link

3. Click on the **Create New Rule** link under the **View Rules** page.



Create New Rule Link

4. Type a descriptive title for the rule name in the **Rule Name** field. *This field has a 50 character limit.*
5. Enter the dollar amount in the **order approval level** field the limit you require orders for approval.
6. Enter the dollar amount in the **product approval level** field you require approval for at the product level.
7. Click **assign users**

Note: Do not enter a dollar sign when entering a dollar figure in the numeric fields.

Note: Clicking **Cancel** will abandon the 'create a dollar approval rule' process.

Dollar Approval Rules Page

8. Click in the **checkbox(s)** next to the **user name alias** you want to assign to the rule **or** click **Select/Deselect All** if you want everyone assigned and all checkboxes will populate automatically.
9. Click **Add To Group**

Assign Users Page

10. Click **Submit** to save.

Users Assigned

How to Edit a Dollar Rule

11. Click on **Manage Users > Dollar Rules** (illustrated previously).
12. Click **Edit** next to the Dollar Rule you wish to modify.

View Rules dollar limit tips ⇄

Dollar Limits - prohibit purchases over established dollar limits.

Currently no Dollar Limit Rules

[Create New Rule >>](#)

Dollar Approvals - require approval for purchases over established dollar levels.

Dollar Approval Rule Name	Order Level	Product Level	
ACME APPROVAL GROUP RULE	\$2,000.00	\$500.00	Edit Delete

[Create New Rule >>](#)

View Rules Page

13. You can type over the text in the **rule name** field, **order approval level** and/or **product approval level** fields.
14. Click **Submit** if you are finished. If not, omit this step and move to step 5.

Dollar Approvals dollar approval tips ⇄

Dollar Approval Rules:
orders over the following dollar levels will require approval before they are processed:

rule name	ACME APPROVAL GROUP RULE	
order approval level	\$ 2,000.00	orders over this level will require approval
product approval level	\$ 600.00	orders containing products over this level will require approval

the following users are assigned to this Approval Rule: [< assign users](#)

George Arnold (garnold1)	Luke John (ljohn)	Matthew Mark (mmark)
Mary Mulholland (mulholland1)		

[Submit](#) [Cancel](#)

Dollar Rules Page in Edit Mode

15. Click **assign users**

Dollar Approvals dollar approval tips ⇄

Dollar Approval Rules:
orders over the following dollar levels will require approval before they are processed:

rule name	ACME APPROVAL GROUP RULE	
order approval level	\$ 2,000.00	orders over this level will require approval
product approval level	\$ 600.00	orders containing products over this level will require approval

the following users are assigned to this Approval Rule: [< assign users](#)

George Arnold (garnold1)	Luke John (ljohn)	Matthew Mark (mmark)
Mary Mulholland (mulholland1)		

[Submit](#) [Cancel](#)

Assign Users Link

- 16. Click the checkboxes of the users you want to reassign or click **Select/Deselect All**
- 17. Click **Add To Group**

Add to Group Button

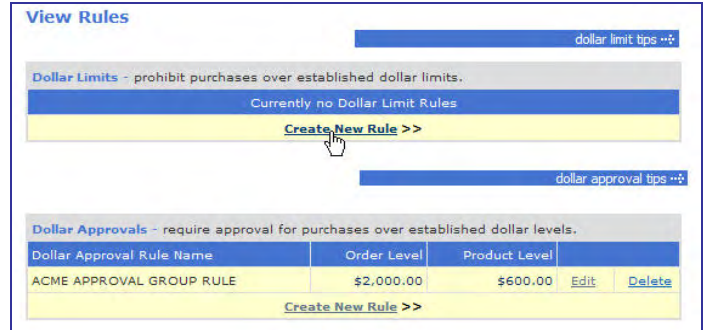
- 18. Validate your modifications and click **Submit**

Note: Clicking **Cancel** will abandon the editing' process.

Validate Changes before Saving

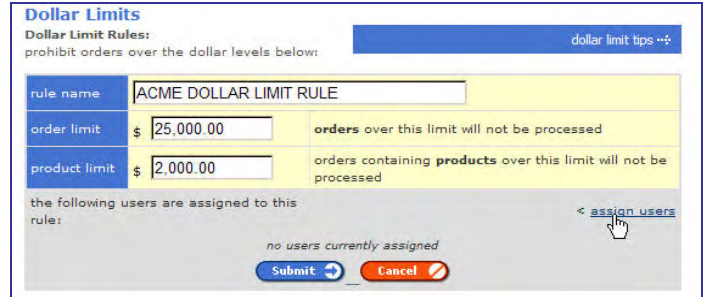
How to Create/Edit a Dollar Limit Rule

1. Click on **Manage Users > Dollar Rules** (illustrated previously).
2. Click **create new rule** under **Dollar Limits**



Create New (Dollar Limit) Rule Link

3. Type a descriptive title for the dollar limit rule name in the **rule name** field. *This field has a 50 character limit*
4. Enter the dollar amount in the **order limit** field for the limit you require orders before the user may proceed.
5. Enter the dollar amount in the **product limit** field for the amount you will not allow orders at the product level to be processed.
6. Click **assign users**



Dollar Limit Rules Page

Note: Do not enter a dollar sign when entering a dollar figure in the numeric fields.

Note: Product Limits cannot exceed Order limits.

Note: Clicking **Cancel** will abandon the 'create a dollar approval rule' process

7. Click in the **checkbox(s)** next to the user name alias you want to assign to the rule **or** click **Select/Deselect All** if you want everyone assigned.
8. Click **Add To Group**



Assign Users Page

9. Click **Submit** to save.

Submit Button

Note: Follow the same steps for editing Dollar Approval Rules (pg. 7).

View Rules Page

A Message an end user may see...

Order exceeds Dollar Limit Rules

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