

# Create and Manage Cart Approval Conditions

## Create and Manage Cart Approval Conditions. For Administrator Use Only.

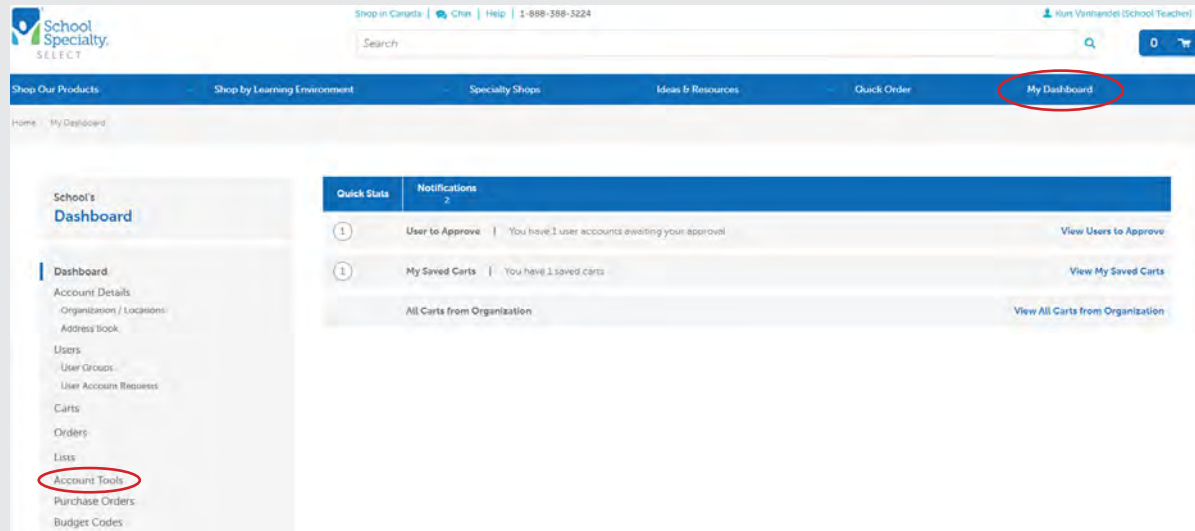
Welcome to School Specialty Online! Below are some instructions to help only **Administrators** **create and manage Approval Conditions**. If you are not an Administrator, please do not refer to the instructions below..

### Login:

- Visit [select.schoolspecialty.com](https://select.schoolspecialty.com).
- Under **Account Sign In** enter your Username and Password, click **SIGN IN**

### Access Your Account Tools:

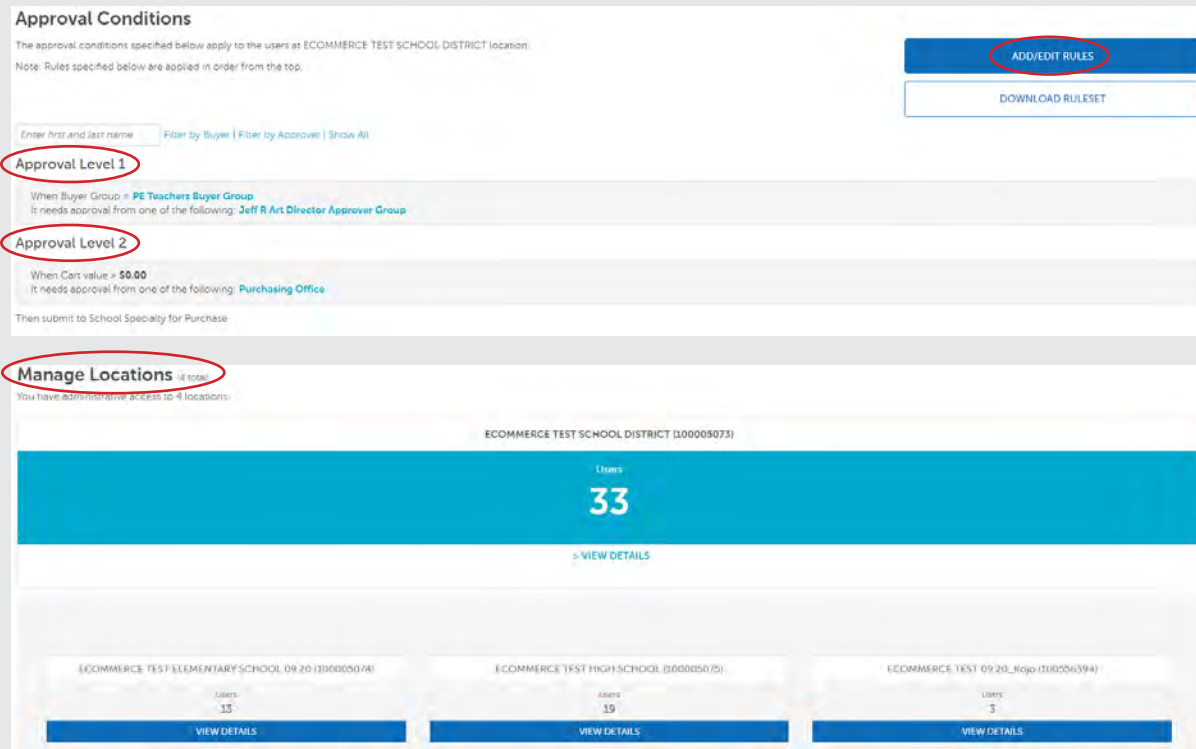
- Click **My Dashboard** in the top right navigation tab
- Click on **Account Tools**



# Create and Manage Cart Approval Conditions

## Access Your Account Tools: (continued)

- Your Approval Conditions will be listed for the Account/Location for which you are an Administrator for. For example: If you are the Administrator for the Elementary School, you will see the Elementary School's Approval Conditions. You can add/edit rules by selecting the **ADD/EDIT RULES** button. Note: If you are the Administrator for the School District's Central Office where the district has multiple schools, you will also be able to see each school's Approval Conditions by scrolling to the bottom of the page to the **Manage Locations** section and clicking the individual schools



**Approval Conditions**

The approval conditions specified below apply to the users at ECOMMERCE TEST SCHOOL DISTRICT location.  
Note: Rules specified below are applied in order from the top.

[ADD/EDIT RULES](#)  
[DOWNLOAD RULESET](#)

Enter first and last name | Filter by Buyer | Filter by Approver | Show All

**Approval Level 1**

When Buyer Group = **PE Teachers Buyer Group**  
It needs approval from one of the following: **Jeff R Art Director Approver Group**

**Approval Level 2**

When Cart value > **\$0.00**  
It needs approval from one of the following: **Purchasing Office**

Then submit to School Specialty for Purchase

**Manage Locations** if total

You have administrative access to 4 locations:

ECOMMERCE TEST SCHOOL DISTRICT (100009073)	
Users	
33	<a href="#">VIEW DETAILS</a>

ECOMMERCE TEST ELEMENTARY SCHOOL 09 20 (100000074)	
Users	
15	<a href="#">VIEW DETAILS</a>

ECOMMERCE TEST HIGH SCHOOL (100005075)	
Users	
19	<a href="#">VIEW DETAILS</a>

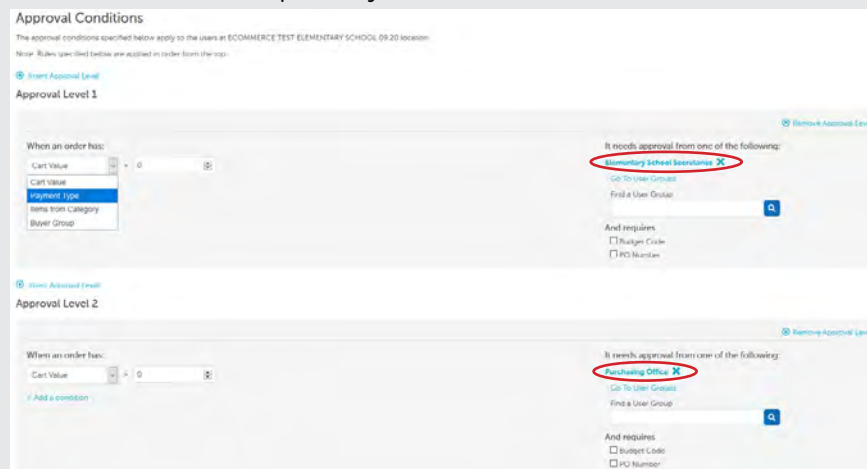
ECOMMERCE TEST 09 20 Hojo (100506394)	
Users	
3	<a href="#">VIEW DETAILS</a>

# Create and Manage Cart Approval Conditions

## Understanding Approval Conditions:

Once a cart is submitted for approval, the Approval Conditions will trigger in order starting with Level 1 and advancing through all conditions. Carts will not be approved into orders until each qualifying condition is met. If the cart requires approval at a designated level, the cart will need approval from a member of the Approver Group listed. Note: Your cart might not require approval at each level. If your cart does not meet the conditions of a level, it will skip to the next level

- **Approver Group:** If your cart meets the condition for approval, it will route to all members of the Approver Group indicated at that step. Approval Groups are created and maintained under My Dashboard – User Groups. In the screenshot example below, Elementary School Secretaries and Purchasing Office are examples of Approver Groups. Click the Approver Group to view or edit the members of the group. Approver Groups must contain at least one member but can contain multiple. If a cart is routed to an Approver Group for approval, each member of the Approver Group will be emailed notifying them of the pending cart. Any member of the Approver Group will have the ability to Approve, Modify, or Reject any cart routed to the group
- **Special Rules For Members Of Approver Groups:** If I am a member of an Approver Group in my Approval Condition steps, any carts that I create and submit for approval will automatically skip to the step after the highest step for which I am in the Approver Group. For example, in the screenshot example below, if I am a member of the Elementary School Secretaries Approver Group and submit a cart for approval, Approval Level 1 will be skipped as I am member of the Approver Group (I don't want to route a cart to myself for approval). In the same example, if I am a member of the Purchasing Office Approver Group and submit a cart for approval, Approval Level 1 and Approver Level 2 will be skipped as I am a member of the Approver Group in Level 2 – my cart will be converted into an order and sent to School Specialty as all of the conditions will have been met



# Create and Manage Cart Approval Conditions

## Add or Edit Approval Conditions:

- Click **ADD/EDIT RULES** then click **SAVE RULES** when complete. Each Approval Level is based on conditions. There might be multiple conditions per level. If the cart meets the conditions of the level it will be routed to the members of the Approver Group for approval. The simplest and most common condition is "When an order has Cart Value > \$0". This means every cart will route to the Approver Group. But there are more conditions you can choose:
  - **Payment Type:** You can choose a payment type to drive your condition. Choose between:
    - Invoice: When payment type = Invoice, route to Approver Group
    - Credit Card: When payment type = Credit Card, route to Approver Group
  - **Items From Category:** Choose from a list of categories to include. If your cart contains items from the categories indicated, they will route to the Approver Group. Example: If I need additional approval for a furniture purchase, your cart can be routed accordingly
  - **Buyer Group:** If everyone at your school does not follow the same rules, you can control the cart approvals using Buyer Groups. Buyer Groups are created and maintained under **My Dashboard – User Groups**. Members of Buyer Groups can have their carts routed differently for approval
    - For example: If my school has 4 "Specialty" teachers who need additional approval from the Curriculum Directors I can add these teachers to a Buyer Group named "Specialty". I can set an additional condition that says *When Buyer Group is Specialty, route to Curriculum Directors Approver Group*. Use Buyer Groups to meet any condition where your users do not all follow the same approval
  - **Find a User Group:** Use this section to find and choose the Approver Group for your Approval Level
  - **+ Add a condition:** Use this function to add another condition to your Approval Level
  - **+ Insert Approval Level:** Use this function to add another Approval Level step
  - **X Remove Approval Level:** Use this function to remove your Approval Level
  - **Budget Code:** Checking this box in an Approval Level means the user who approves the cart at that level will be required to provide a Budget Code for each line of the cart before they can approve
  - **PO Number:** Checking this box in an Approval Level means the user who approves the cart at that level will be required to provide a Purchase Order Number for the cart before they can approve

Note: An Approval Level cannot be updated or removed if there are carts currently awaiting approval at that step. All carts at the step must be approved or rejected before the step can be modified

# Create and Manage Cart Approval Conditions

## Approval Conditions

The approval conditions specified below apply to the users at ECOMMERCE TEST ELEMENTARY SCHOOL 09 20 location  
Note: Rules specified below are applied in order from the top.

[Insert Approval Level](#)

### Approval Level 1

When an order has:

Cart Value

Cart Value  
Payment Type  
Items from Category  
Buyer Group

It needs approval from one of the following:

[Elementary School Secretaries](#) ✕

[Go To User Groups](#)

Find a User Group



And requires

☐ Budget Code

☐ PO Number

[Insert Approval Level](#)

### Approval Level 2

When an order has:

Cart Value

[Add a condition](#)

It needs approval from one of the following:

[Purchasing Office](#) ✕

[Go To User Groups](#)

Find a User Group



And requires

☐ Budget Code

☐ PO Number

**Questions?** Call our Toll Free Online Support Department at **800-513-2465 ext 2**