

SYNERGY.NET

Much, much more than just an On Line Order Entry system SYNERGY.NET separates you from the competition by giving you, your employees and your contractors a complete tool to manage the On Line ordering process.

NOW whether you are a Facilities Manager, School Board or just large and diverse organization

YOU CAN DEFINE BUDGETS AND SPENDING LIMITS

- Control the Budget for the entire Site
- Control the Spending Limit by dollar amount by User
- Control the Per Order Limit by dollar amount by User
- Enforce Manager approval of any order that exceeds the Limits in place with the ability to approve, edit or delete the order

YOU CAN DEFINE USER ROLES

- Control whether they can place orders from JUST the approved Order Guide or the entire Catalog
- Control whether they can view products on the JUST the Site Guide or the Site and full Master Customer Guide
- Control whether they can or cannot see prices
- Control whether they can or cannot see the entire Catalog

- Control whether they can or cannot create and save their own List of products
- Control whether they can or cannot create or modify a GL Code used for purchase tracking on your own Back End Accounting system

YOU CAN DEFINE REPORTING REGIONALLY AND LOCALLY

- Generate your own reports by Region or by Individual Location
- Ability to group Regions together for management and reporting purposes
- Define GL Coding for any tracking purposes such as expense, project management or to parallel your own current Back End Accounting system

TRACK AND REVIEW

If you have web services communication available from your vendor

- View Accounts Receivable and transaction detail (invoices)
- View signed Proof of Delivery
- View status of Open Orders
- Find Purchase Orders
- View Usage and export details (such as to Excel)
- View Sales History

AND you can do this all this on your own through a single portal by simply using the tool provided to you—**SYNERGY.NET**

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GENERAL OVERVIEW

SYNERGY.NET provides a robust and flexible User environment to manage User Access and Permissions, Budgets, Spending Limits, General Ledger (“GL”) codes, place Orders, Browse Products and set the domain (Account – site location) for which to place an order if the User has multiple site responsibility.

User also has the ability to access Customer Service (if this has been enabled for your account and your Vendor). Customer Service places a real time web services call to the Vendor’s back end system to provide up to the minute Accounts Receivable information including Proof of Delivery, Order status, Product Usage, Sales History and Customer PO Search.

User Profile and Permissions

The system allows the initial set up of a Regional Manager, Manager and User. The rolls of each are as follows:

Regional Manager

The highest level user is the Regional Manager. This is initially set up by the System Administrator when giving you access to the system. If you have multiple location accounts tied to a main Bill To account, the system allows the System Administrator to associate the Regional Manager to one or many Child Account locations or Regions. The Regional Manager will then have full administrative privileges for those Child Account locations.

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The Regional Manager has full access to all of the features of the system including Sites, Budgets, GL and Product Searches. If there are no Child Accounts or regional locations then the highest level user is Manager for the one Account.

Manager

The second level user is Manager. This is initially set up by the System Administrator when giving you access to the system. The Manager is associated with an individual Child Account or regional location. The Manager has the ability to set up Users and to define their rolls, sites and permissions. The Manager has full access to all of the features of the system including Sites, Budgets, GL and Product Searches.

User

The lowest level of permissions or access is the User. The User’s profile and permissions are set up by their Manager or Regional Manager. The User is tied to one or more Domains (Account – Ship To Locations) or Sites. The Manager can set the User’s profile, login and password; define permissions: See Account Order Guide or just Site Order Guide, Enter and edit GL codes, See prices in the Product Catalog; and set Spending Limits – Overall and/or Daily and assign the Manager that has approval authority.

Security

User access is controlled by User ID and Password. The Administrator must assign and set up the Manager for security access codes before you can begin. Other Users can then be set up by the Manager. Access

codes are used to make sure the information that is displayed is specific to the User.

Budgets

Budgets are a Domain (Account-Site) level control. Budgets may be set up or modified on the Budgets page. Only a Manager can access the Budgets page. The Budget is maintained on your Vendor's back end system or on the site if your Vendor does not support this functionality.

With full Vendor back end integration, when a Budget is set up it will control the spending for the Domain (Account-Site) regardless how the order was entered. Orders entered by some means other than On-Line, such as over the phone are tracked in Budgets. Conversely, when a Budget is changed by a Manager it is change for the Domain (Customer-Site) and will control orders entered by any method.

Budgets can be set by Date or Amount.

If a Budget is set by Date it can be defined to be Monthly, Quarterly, Semi-Annual, Annual or Custom. If Monthly, Quarterly, Semi-Annual, or Annual are chosen the system will automatically define the end date to be the last day of the last month in the period. If Monthly, Quarterly, Semi-Annual, or Annual are chosen the system will automatically renew the Budget for the same time period and amount. If Custom Date is selected it will end on the date selected.

If a Budget is set by Amount it will not automatically renew.

A Purchase Order (PO) may be tied to a Budget.

Spending Limits

Spending Limits are a User level control. They are maintained on the site. A Manager or Regional Manager does not have Spending Limits. Spending Limits may be set and/or modified by the User's Manager. Only a Manager can access the Spending Limits set up and edit them.

Spending Limits can control the Total Dollar amount the User is authorized to spend without approval or the Total Order Dollar amount the User is authorized to spend without approval or both.

Spending Limits can be defined to be by Daily, Weekly, Bi-Weekly, Monthly, Semi-Annual, Annual or Custom Dates.

In setting up Spending Limits the Manager is given the opportunity to determine whether they automatically renew and who the Manager (if there is more than one for the Customer) who can authorize the transaction that exceeds the User's Spending Limits.

General Ledger Codes

General Ledger Codes consist of five fields of six alpha-numeric characters. The GL Codes can correspond to your back office accounting system configuration or can be any system of product or product/site tracking the User wants to create. The GL Codes can be tied to a product by Shipping Location or for all of your Locations. Additionally, depending on the User's profile and permissions the User can add or

edit the individual GL Code tied to a product on a specific order at the time of order submission. A User can tie one GL Code to the entire order at the time of order submission. The actions at order submission will be tied only to the order being submitted.

Depending on preferences, the GL Codes will print on Invoice (if supported by your Vendor) and will be available for reporting purposes.

Place Orders

Orders can be created from one of multiple methods or combination of methods. The principle tools are Previously Ordered Guide, Product Catalog and Your Lists.

Order Guide

The Order Guide consists of a list of all products purchased by the Domain (Account – Site) based on the contract in place with the Vendor or based on a predefined list provided to the site. The Guide can view by Site List – just the items purchased by the Site or by Master List – items purchased by every one of the Account’s sites. The profile/permissions for the User determine whether they can see the Master List.

The User can check and add items to the Cart or to a List that they can save and refer to later.

Product Catalog

The Product Catalog is a list of all available products. The User can search for products by various methods (see Browse Products) and add them to a Cart or List. The Product Catalog also allows the User to drill into

Product Detail for more information about the product and to manage Product – General Ledger Account Codes.

Your Lists

Your List allows the User to set up, retain or delete Lists as they desire. The List can be named by the User. The Lists are tied to the User.

Browse Products

The Product Catalog allows the User to browse products by Category, Vendor or Word Search.

Category Search displays the highest level category first. The User can drill down into the sub-categories until the lowest level to display a List of Products that meet the criteria.

Vendor or Manufacturer’s Search displays the Manufacturers available. The User can drill down to display a List of Products for that Manufacturer.

Word Search allows the User to enter a word or words to search for in the System. A search of descriptions and attributes of all products will be performed. The System will display a List of Products that meet one or more of the words entered.

On the List of Products the User can add products to the Cart, add products to a List, get their price on a product that they have never purchased before and drill down into Product Detail.

Budget & Spending Limit Warning

Budget: \$1000.00
 SL: \$100.00
 POL: \$50.00
 Used Budget :\$74.00 Used SL :\$26.78 Used POL :\$48.62

Total Item In Cart 1

Delete	Product ID	Description	Qty.	Total
	FT19375	TOILET TISSUE 2PLY CORELESS FT.JAMES 36/1000/CAS COMPACT	1	\$48.62

Image	Product ID	
	AFJRT1M2	TOILET AFFE...
	FT19375	TOILET FT.JA...
	HTALMOND4	HAM 4/1...
	HTLIQSOAP4	HAM 4/1...
	KC01950	TOWEL KIMB...

Define Budgets

Budget

Select Type:

Select Budget Type:

Start Date:

End Date:

Budget Amount:

PO#: