



Setting Up Order Approvals in McKesson SupplyManagerSM

McKesson SupplyManager approval rules help control spend and make sure orders are compliant. Approval rules let you set up a review process of all orders placed at any of your locations. Approvers are pre-assigned in SupplyManager.

- 1 After you have selected products and move on to finalize your cart, you will see this message if your order requires approval.

The screenshot shows the McKesson SupplyManager interface. At the top, there is a search bar and navigation links. A red box highlights an "Approval Alert - You have exceeded your order spending limit of \$0.00 by \$27.63". Below the alert, two items are listed in the cart: a gown and a pair of gloves. To the right, the "ORDER SUMMARY" shows a subtotal of \$27.63 and an estimated total of \$27.63. A "CONTINUE TO CHECKOUT" button is visible. Below that, the "ACCOUNT SUMMARY" shows the billing account information for "MCKESSION PHYSICIAN OFFICE".



- 2 After you select "Continue to Checkout", you will see this alert a second time. Select your approver in the drop down on the right, if you have more than one. Below that, you can add any notes or comments you would like your approver to see.

The screenshot shows the "Secure Checkout" page. At the top, there are navigation tabs for "Cart", "Checkout", and "Complete". A red box highlights an "Approval Alert - You have exceeded your order spending limit of \$0.00 by \$27.63". Below the alert, there is a text input field for a note: "Would you like to include a note? (optional)". To the right, there is a dropdown menu for "Approver:" with a red box around it. Below the note field, there is a "Characters Left: 255" indicator. At the bottom, there are sections for "Billing Account" and "Purchase Order Name".



3 Finally, you are ready to “Submit for Approval”.

Shipping Destination

#225472
MCKESSON PHYSICIAN OFFICE-DC 03
 PRICING FOR DEMO ONLY
 1405 N. CHOUTEAU
 KANSAS CITY, MO 64120

SWITCH

Add a note to your packing slip

Notes are not seen by delivery drivers, customer service, or warehouse

[Add a Note](#)

Okay. We've got everything we need.

2 In stock items - ship from your warehouse network

Cart Number:	1177010
Items (2)	\$27.63
Subtotal	\$27.63
Estimated Total*	\$27.63

SUBMIT FOR APPROVAL

* Taxes and Shipping & Handling are estimated



4 You may view any orders you submitted for approval at any time by selecting “Your Carts”.

Welcome to the New SupplyManager! [Feedback & Support](#) >

What can we help you find? Q

#61884
MCKESSON PHYSICIAN OFFICE 🛒 0

Shop Products ▾ Orders ▾
Reports Resources ▾

Carts You Submitted for Approval

Cart #	Lines	Shipping Destination	Submitter	Approver	
1176924	1 Items	#225472 MCKESSON PHYSICIAN OFFICE-DC 03			
1176950	1 Items	#225472 MCKESSON PHYSICIAN OFFICE-DC 03			2018/10/26 11:55 AM EDT
1176926	1 Items	#225472 MCKESSON PHYSICIAN OFFICE-DC 03			2018/10/26 11:07 AM EDT

Your Carts

Approve Orders

Email Notifications

Contact Support

Log Out



How Are Orders Approved?

1 After your order is submitted, your approver receives an email asking them to approve or reject your order.

McKesson Medical-Surgical

Cart # **1176926** Needs your Approval

Approve

Reject

Currently Needs Approval

Reason

You have exceeded your order spending limit of \$20.00 by \$25.08

PO	Cart #	Created By	Submitted	Total
88000000000000000000	1176926	Charles Beaudin	10/26/18 7:11:08 AM	\$34.70

Account # 000000
MCKESSON MEDICAL CENTER INC

Shipping To# 000000
MCKESSON MEDICAL CENTER INC
1405 N. CHOUTEAU DR
KANSAS CITY, MO 64120

Item #	Description	Mfg #	UOM	Price	Qty	Total
398	In stock, ships from your local warehouse	305125	BX	\$3.47	10	\$38.08
Total:						\$34.70



2 To see all orders that need approval, select **“Approve Orders”** in SupplyManager.

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MCKESSON What can we help you find? #61884 MCKESSON PHYSICIAN OFFICE

Shop Products Orders Reports Resources

Carts Needing Your Approval

Cart #	Lines	Shipping Destination	Submitter	Approver
1176924	1 Items	#225472 MCKESSON PHYSICIAN OFFICE-DC 03	CARISIMONE	SIMONEAPPROVER
1176926	1 Items	#225472 MCKESSON PHYSICIAN OFFICE-DC 03	CARISIMONE	CARILHOWARDSIMONE

Your Carts
Approve Orders
Make a Payment
Email Notifications
Contact Support
Log Out

2018/10/26
11:07 AM EDT

3 Once an approver selects a cart to modify, they may reject, edit or approve the order.

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Shop Products Orders Reports Resources

Approval Needed - CARISIMONE needs your approval on the rule below.

1. You have exceeded your order spending limit of \$0.00 by \$9.32

Note: jdijgalkj

REJECT

All Items (1) Pending Availability (1) Quick Add

XYLOCAINE, MDV 1% 50ML (25/CT)9APPPH

Backordered, 0 stocked, balance ships as available Find Alternatives

1 x \$9.32 per EA/1 \$9.32

Remove Edit

ORDER SUMMARY

Cart Number: 1176924
Items (1) \$9.32
Subtotal \$9.32

Estimated Total* \$9.32

APPROVE THIS ORDER

* Taxes and Shipping & Handling are estimated

ACCOUNT SUMMARY

Billing Account

#61884
MCKESSON PHYSICIAN OFFICE
*SUPPLYMANAGER TEST ACCOUNT SWITCH



Questions?

Contact the SupplyManager Help Desk at 800.422.0280