

DSSI APPROVALS

USER GUIDE

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DSSI APPROVALS

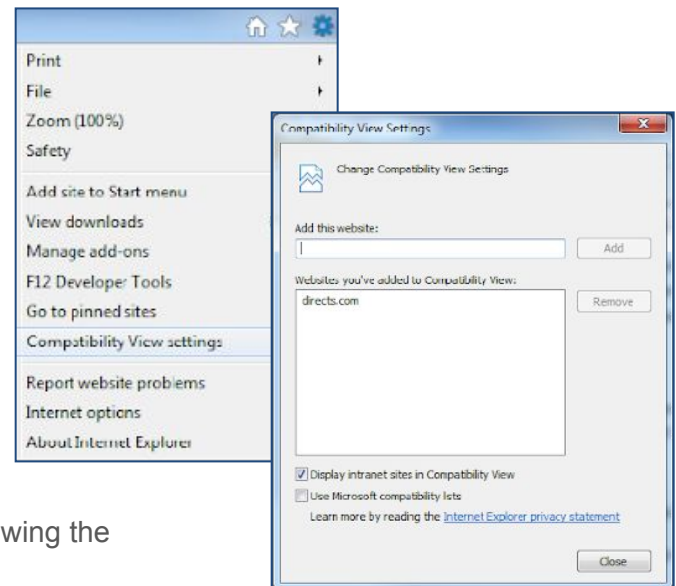
INTERNET EXPLORER COMPATIBILITY SETTINGS



If you're unable to view your DSSI Approvals in Internet Explorer, you may need to adjust your Compatibility View Settings or use Google Chrome instead.

REMOVE DSSI FROM IE COMPATIBILITY MODE

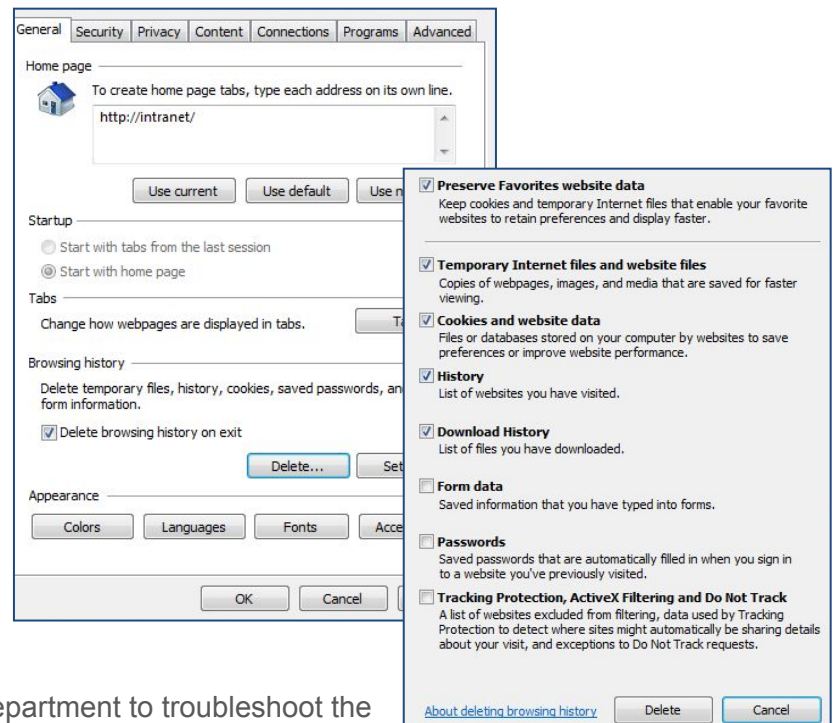
- Click the “gear” icon in the upper-right corner of Internet Explorer.
- Scroll down and select **Compatibility View Settings**.
- In the “Websites You’ve Added to Compatibility View” field, select any sites with “directs.com” and then click **Remove**.
- **Close** the pop-up window.
- Your screen should automatically refresh and display the correct user interface and Approve/Deny buttons.



If that did not help, try deleting your Browsing History by following the instructions below.

DELETE YOUR BROWSING HISTORY

- Click the “gear” icon in the upper-right corner of Internet Explorer.
- Scroll down and select **Internet Options**.
- Under the *Browsing History* section, select the **Delete** button.
- Ensure the **History** checkbox is selected.
- Click the **Delete** button and then **OK**.



If that still didn't help, please contact your IT department to troubleshoot the issue and in the meantime, use Google Chrome.

DSSI APPROVALS

PURCHASE ORDER (PO) APPROVALS



Approval processes are set up to provide visibility and agreement from Approvers before sending orders for fulfillment. To review and take action on POs pending your approval, choose the **Purchase Orders** widget on the main screen of DSSI and follow the prompts from there. Find orders faster by using the filter box to narrow your results by location or Supplier.

REVIEW AND EDIT PURCHASE ORDERS

Prior to approving an order, review the products and their quantities and GL code assignments. **To edit a GL or Quantity for a product, click the corresponding [Edit](#) link and follow the prompts on the page.**

Line Items	Edit Line
On-Off Rocker Switch G/L 9005 Product # 335540 Quantity: 1 - EA \$1.81 (\$1.81 EA) Edit	Description <input type="text" value="On-Off Rocker Switch"/> G/L <input type="text" value="9005 Maintenance - Supplies"/> QTY <input type="text" value="1"/> <div>CANCEL REMOVE LINE SAVE</div>
Decorator Rocker Switch 20 Amp G/L 9005 Product # 918895 Quantity: 1 - EA \$20.92 (\$20.92 EA) Edit	

APPROVE OR DENY PURCHASE ORDERS

- Click **Approve** to automatically route the PO either to another Approver or to the vendor for fulfillment.
- Choose **Deny** to send it back to the user with notes.
- Note: If you add Notes to a PO, they will stay with the order; they will NOT be seen by the Supplier.

QUICK TIPS

- Contact your Help Desk if you feel any GLs are missing or need overrides.
- The **More** button is for users with extra approval rights. Follow any instructions that appear.
- Pay attention to any product indicators. (e.g., **Off Order Guide**)
- The PO and its status (with an Approver or with a vendor) can always be found on the *Order History* page.

DSSI APPROVALS

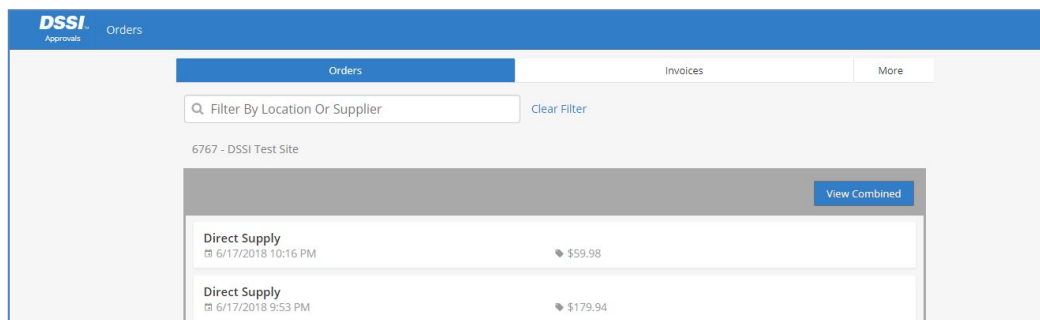
COMBINE PURCHASE ORDERS TO APPROVE



When there are SUPPLIES orders for the same location, going to the same vendor, with you as the final Approver, you will see those orders called out in a gray box with a blue **View Combined** button.

Similarly, when there are FOOD orders for the same location, going to the same vendor, with the same scheduled delivery day, with you as the final Approver, you will also see those orders called out in a gray box with a blue **View Combined** button.

You can approve them all as a combined order, while still retaining the individual POs and PO #s for users in Order History.



DSSI APPROVALS

INVOICE APPROVALS



To review and take action on invoices pending your approval, choose the **Invoices** widget on the main screen of DSSI and follow the prompts from there.

Many organizations allow users and Approvers to edit the GL codes of some products with pre-determined overrides. Prior to approving an invoice, ensure the products are coded correctly so payment can be allocated accordingly.

REVIEW AND EDIT INVOICES

Here's how to do that once you're on the *Invoice Approval* page:

1. Scroll down to the **Line Items** section of the invoice.
2. Review each product and the corresponding **GL**.
3. **Edit a GL by clicking the corresponding [Edit](#) link.**
4. On the next page, select the proper **GL** and **Save**.

The screenshot illustrates the process of editing a line item's GL code. On the left, a list of line items is shown. The first item, 'Pleated Air Filter, 16x24x2, MERV 8', is highlighted with a blue border. To its left are two orange squares with white numbers '1' and '2'. To its right is an orange square with a white number '3' and a blue 'Edit' link. Below the line item list is an orange square with a white number '4'. To the right of the line item list is a modal window titled 'Edit Line'. Inside the modal, there is a dropdown menu for 'G/L' with the selected value '660100-5035 Repairs & Maint-Maint'. Below the dropdown are two buttons: 'CANCEL' and 'SAVE'.

Line Items	
Pleated Air Filter, 16x24x2, MERV 8	
G/L 660100-5035	Product # 6B952
Quantity: 12 - EA	
\$96.60 (\$8.05 EA)	
SPECIAL	

Edit Line

G/L

660100-5035 Repairs & Maint-Maint

CANCEL

SAVE

APPROVE OR HOLD INVOICES

- Select **Approve** to automatically route the invoice either to another Approver or to be paid.
- Click **Hold** (if available) and include any required information to place the invoice on hold temporarily.
- If you add Notes to an invoice, they will stay with the invoice; they will NOT be seen by the Supplier.

QUICK TIPS

- Find orders faster by using the filter box to narrow your results by location or Supplier.
- Please contact your Help Desk if you feel any GLs are missing or need overrides.
- The **More** button is for users with extra approval rights. Follow any instructions that appear.
- Pay attention to any product indicators like the **Special** one shown above.
- If you add Notes to an invoice, they will stay with the invoice; they will NOT be seen by the Supplier.
- The invoice and its status can always be found on the Order History page, however it will take a few minutes for any edited GL codes to “stick” and appear.

DSSI APPROVALS

PROXY APPROVALS

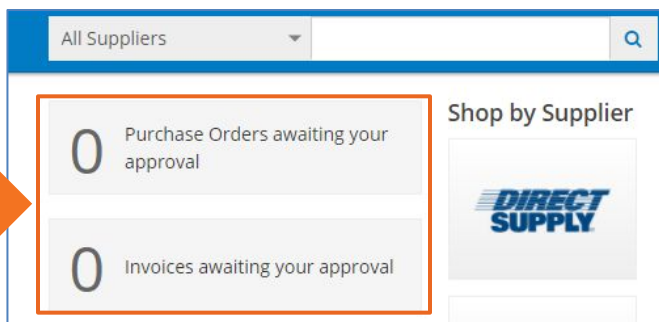


Some organizations have set-up certain users to be **Proxy Approvers**. This can be helpful in situations where the usual approver is unavailable and quick action is required.

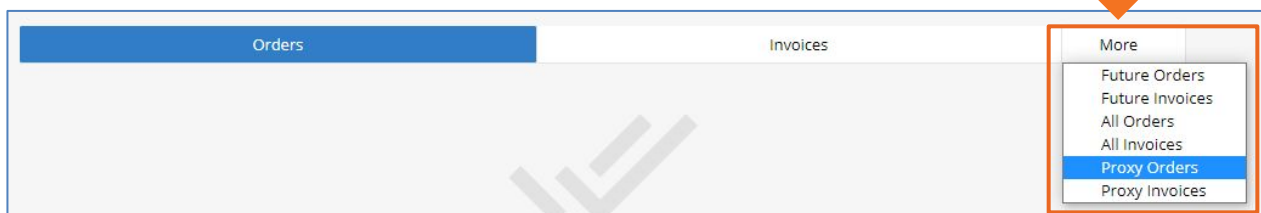
If you are a Proxy Approver, this means that you have the ability to approve POs and/or invoices on someone else's behalf – someone at your location(s) who is at your level or below within your organization's approval hierarchy. When you approve something on someone's behalf, it sends the PO or invoice to the next step within the approval path.

APPROVE ON SOMEONE ELSE'S BEHALF

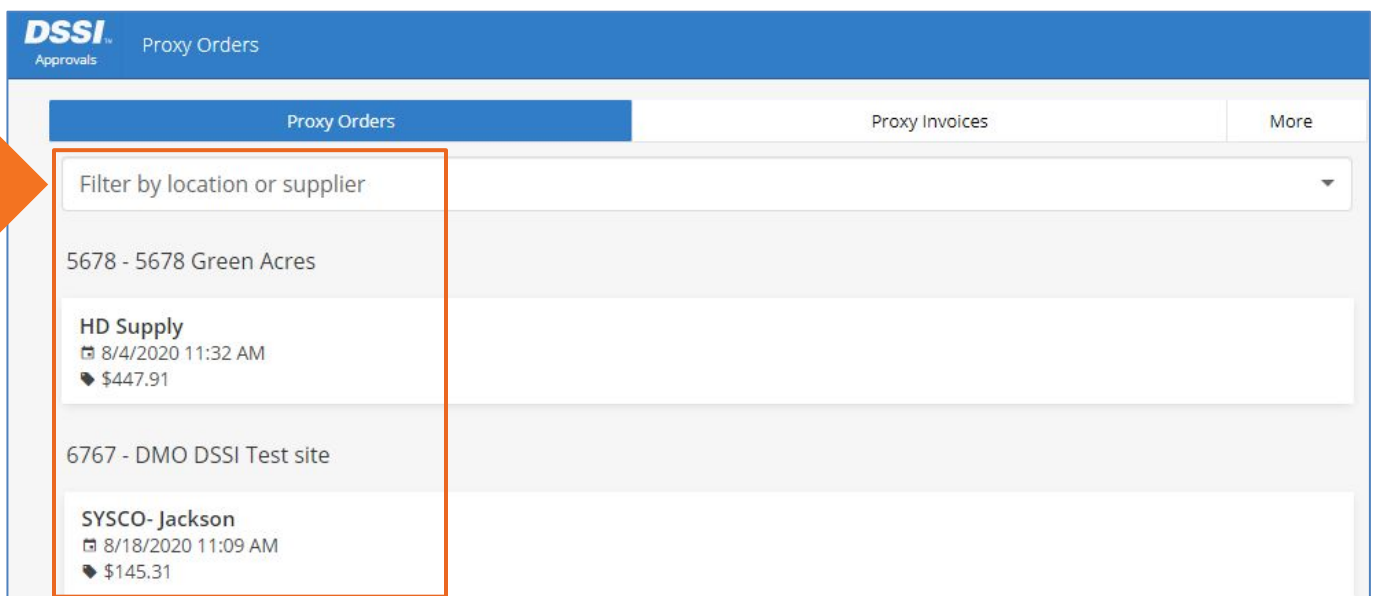
1. Choose either approval widget.



2. Select the **More** button and then pick either **Proxy Orders** or **Proxy Invoices**.



3. Scroll to find the PO or invoice pending approval that you need to take action on; or use the filter box to limit the results that appear.



DSSI APPROVALS

MOBILE APPROVALS



On the go? Away from your computer? Approve orders and invoices anytime from your Android or Apple device.

LOGIN FROM YOUR MOBILE DEVICE

Step 1: Login

- Go to www.directs.com/DSSI.
- Enter your DSSI credentials.
- Select **Remember Me**. (optional)
- Click **Sign In**.

Step 2: Select Approvals

Choose the **Approvals** “widget” on the DSSI Application Suite page.

TAKE ACTION ON ORDERS AND INVOICES

Step 3: Select Orders or Invoices

Choose the **Orders** button or the **Invoices** button. Filter by **Location** or **Supplier** to narrow your results.

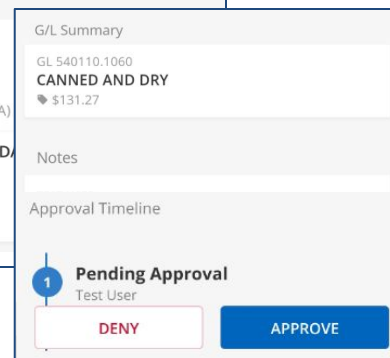
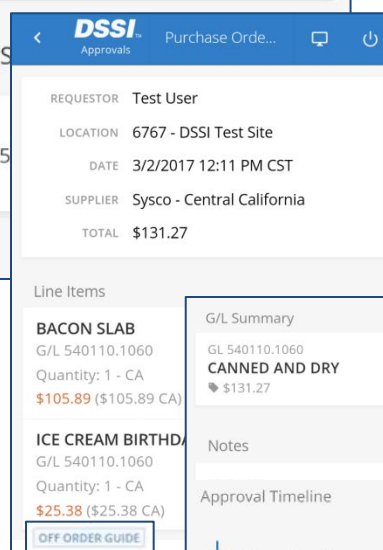
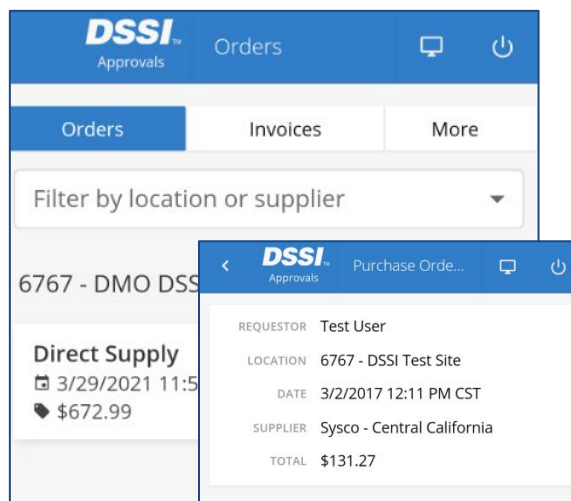
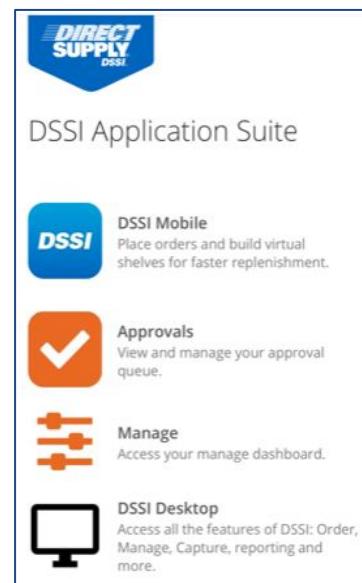
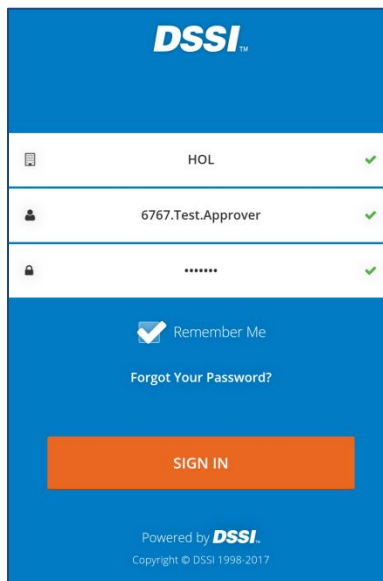
Step 4: Review and Edit

- Review: Scroll down to see the **Line Items**, product-level indicators (if applicable), **GL Summary**, and **Notes** fields.
- Edit: Edit **GLs** and/or **Quantities** on orders or **GLs** on invoices.

Step 5: Take Action

- Orders:
 - Combine orders for approval when they are for the same location, going to the same Supplier, and you are the last step of the approval process.
 - **Approve** or **Deny** and enter notes (if required).
 - Budget Control users will be prompted to acknowledge when any budgets are being exceeded by the order.
- Invoices:
 - **Approve** or put on **Hold** and enter notes (if required).

Note: The Approvals page has a **More** button for users with extra approval rights. Follow any instructions that appear.



Taking Cost Out of Healthcare®

DSSI APPROVALS

DSSI CAPTURE APPROVALS

DSSI APPROVALS

DSSI CAPTURE APPROVALS (INVOICES)



Click **Invoices Awaiting Your Approval** on the DSSI home page. Then, select any **DSSI Capture**-denoted invoice. On the *Invoice Detail* page, select the **View Original Invoice (PDF)** link to open the original invoice image in a new window. Confirm that everything was manually keyed in correctly. If necessary, click any **Edit** link to edit a *Line Item*.

APPROVE THE INVOICE

If you are confident that the invoice details match the information from the invoice image, select **Approve** to automatically route the invoice either to another Approver or to be paid. You will receive an **Invoice Approved** message and the invoice will disappear from your approval queue.

PLACE THE INVOICE ON HOLD

If you are not ready to approve the invoice, you can place it on a temporary hold (if available). Click **Hold**, select a **Reason** for the hold, enter a **Note**, and click **Hold** again. You will receive an **Invoice Held** message and the invoice will remain in your approval queue with an **On Hold** indicator.

REJECT THE INVOICE

If you must reject the invoice due to a duplicate invoice or a mismatch in information that's not editable, click the **Reject** button, choose a **Reason**, and provide a detailed explanation so the user understands why you rejected it. The invoice will then disappear from your approval queue and the user will receive an email that the invoice was rejected and it will include the reason and your note.

QUICK TIPS

- If an **Invoice #** was not listed on the invoice, a standard format would be used. (e.g., DSSI facility code and date)
- If the **Total** doesn't match the invoice image, decide if it's a split expense. (e.g., landscaping, pest control, etc.)
- Depending on your setup, invoices might be entered as a lump sum, broken out, or a combination of both.

DSSI APPROVALS

DSSI CAPTURE APPROVALS (EDITING)



Once you're on the *Invoice Detail* page for a DSSI Capture invoice and need to edit a field, follow these instructions.

EDIT GL CODES AND/OR QUANTITIES

- Scroll down to the **Line Items** section of the invoice.
- Review each product and the corresponding **GL** and **Quantity**.
- Edit a **GL** and/or **Quantity** by clicking the corresponding **Edit** link.
- On the next page, select the proper **GL** or **Quantity** and choose **Save**.

The screenshot displays the 'Invoice Detail' page for a DSSI Capture invoice. The top section contains invoice metadata: INVOICE # CCK772, PO # DMOA00000000979, LOCATION CAPTR - Capture Test Facility, INVOICE DATE 2/25/2019, SUPPLIER DMOA1R2 - CASAMBA, INC. (with an 'Edit' link), REMIT TO ADDRESS 5210 Lewis Rd #10 Agoura CA, 91301, and TOTAL \$358.57. Below this is a 'View Original Invoice (PDF)' button. The 'Line Items' section shows a single line item for 'G/L Level Invoice' with GL/L 6110-5400, Quantity 1 - EA, and a total of \$358.57 (\$358.57 EA). The product is listed as #SPECIAL. An 'Edit Line Item' modal is open, showing a list of GL codes: 6110-5400 Uniform Expense/Maintenance, 6220-3000 Supplies/Nursing, 6220-5400 Supplies/Maintenance, 6444-3000 Prof. Svcs & Consulting/Nursing (highlighted), 6470-4000 Prof. Svcs-Part A/Spch Thpy, and 6470-4100 Prof. Svcs-Part A/Phys Thpy. The modal includes 'CANCEL', 'REMOVE LINE', and 'SAVE' buttons.

EDIT OTHER FIELDS

Depending on your setup, you may have the ability to edit **Header Items** and/or **Custom Fields**. Edit any other fields necessary before approving the invoice.

QUICK TIPS

- If you feel any GL codes are missing, please contact your Help Desk.
- If you don't have the authorization to see GL overrides, please contact your Help Desk.

DSSI APPROVALS

DSSI CAPTURE APPROVALS (REQUISITIONS)



If a requisition goes through an approval process, it will look just the same as any other PO to the *Approver*.

To approve, the *Approver* would do the following:

- Log in to DSSI and access **PO Approvals** as usual.
- Find, review, and approve the requisition (PO) as usual.

Purchase Order Detail

REQUESTOR	Facility-5678 Approver
LOCATION	5678 - PJ's DSSI site
DATE	3/6/2018 10:25 AM CST
SUPPLIER	BUTTER KRUST BAKERY
TOTAL	\$63.90

Line Items

Large Sheet Cake for Resident's 100th Birthday Celebration

G/L 5050

Quantity: 1 - EA

\$63.90 (\$63.90 EA)

SPECIAL

G/L Summary

GL 5050

Food Events

\$63.90

Trend

Approval Timeline

1

Pending Approval

Alex Barr

Corp Admin

Deny

Approve

END
