



SAMIOS PLUMBING SUPPLIES

GETTING READY TO ORDER ONLINE

A guide to your online account with Samios Plumbing Supplies.

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WHAT YOU NEED TO KNOW

- Your prices are online. Any agreements setup between you and your branch for special pricing will be available on the website once you are logged into your account.
- Any products available throughout the entire Samios Plumbing network of branches will be available to you.
- If all products are available right away, your order will be ready to be picked up within a few hours.
- Online only deals will be available.
- You can change the branch you're shopping from at any time.
- You can setup users, departments and budgets for your account.
- Check the availability of products from the branch at any time.
- Any purchase, whether online, or in branch can be viewed within your online account.
- Have your invoices and statements sent to you at any time via email.

SETTING UP AN ACCOUNT

In order to begin purchasing online, you'll be required to sign up to a credit account with Samios Plumbing. Applications for credit accounts are open to organisations and businesses registered within Australia.

What details do you need to provide?

When signing up to a credit account, you will need to acknowledge that the credit provided by Samios is wholly or predominantly for business or investment purposes. Please have the following items ready:

- If you are a company or business, you will need to provide an ABN and at least two trade references (name and phone number).
- Payment details (bank details).

The online application for credit will take roughly 10 minutes to complete, whilst credit applications are processed within two or three business days. You will be contacted with your account details once your approval has been finalised.

The screenshot shows the Samios Plumbing Supplies website interface. At the top, there is a navigation bar with a search bar, a phone number (1300 131 282), and a search query "What would you like to buy?". Below the navigation bar, there are links for "Products", "About Us", "News & Promotions", "Careers", and "Contact Us". The main content area is divided into two sections: "Returning Customer" and "Sign up for an account". The "Returning Customer" section has fields for "USERNAME*" and "PASSWORD*", a "REMEMBER ME" checkbox, and a "Forgot your password?" link. The "Sign up for an account" section has a "Register" button and a note: "You need to fill up a credit application form to become an account holder. Please click on the Register link below to proceed further." Below the note, it says "Fields marked * are required".

FIRST TIME LOGGING IN

The first time you login there are a few areas you need to look at first.

CHANGING YOUR PASSWORD

You will be provided with a password for your account but to ensure your account is completely secure you should change your password as soon as possible to something unique, that only you know.

Complete the following steps to change your password:

- Login to samios.net.au using your current username and password.
- Click 'My Account' in the top right of the screen.
- Under profile click 'Change your password'.
- Fill out the form with the appropriate details and click 'Update Password'.

The screenshot shows a user account menu on the left and a 'UPDATE PASSWORD' form on the right. The menu items are: Your Account, Profile, Address Book, Payment Details, My Quotes, Order History, My Replenishment Orders, Manage My Favourites, Account Statements, View / Pay Invoices, Historical Invoices, Change Store, and Price File. The form contains the following elements:

- UPDATE PASSWORD** (Section Header)
- Please use this form to update your account password (Instruction)
- Fields marked * are required (Note)
- CURRENT PASSWORD* (Text input field)
- NEW PASSWORD* (Text input field)
- Minimum length is 6 characters (Text)
- CONFIRM NEW PASSWORD* (Text input field)
- Cancel (Red button)
- Update Password (Red button)

CHANGING YOUR BRANCH

Your account will be setup with a default Samios branch for the website. The branch will be chosen based on the data provided when you signed up for a credit account and is usually the one closest to you. The data from the branch will determine information such as local availability of products, pricing and expected delivery times. The location of your nominated branch is on the left of the screen.

To change your nominated branch for online shopping complete the following steps.

- Click either the down arrow next to the branch name at the top left of the page or click 'My Account' -> 'Change Branch'.
- Enter the town or post code for the store you want and click 'Find Store' or use the 'Find Stores Near Me' button.
- Select the store you wish to use from the list returned.

Please select your default store

Enter town or Post Code:

[Find Store](#) [FIND STORES NEAR ME](#)

Samios Burligh <i>Street Name: Nudgee Road</i> <i>Postal Code:4011</i> SELECT THIS STORE	Samios Administration <i>Street Name: Macarthur Avenue Central</i> <i>Postal Code:4008</i> SELECT THIS STORE	Samios Enoggera <i>Street Name: Zillmere Road</i> <i>Postal Code:4034</i> SELECT THIS STORE
Samios Geebung <i>Street Name:</i> <i>Postal Code:</i> SELECT THIS STORE	Samios Hervey Bay <i>Street Name: Abbotsford Road</i> <i>Postal Code:4006</i> SELECT THIS STORE	Samios Kingaroy <i>Street Name: Pickering Street</i> <i>Postal Code:4051</i> SELECT THIS STORE
Samios Tingalpa <i>Street Name: sootey Road</i> <i>Postal Code:4107</i> SELECT THIS STORE	Samios Toowoomba <i>Street Name: Moss Street</i> <i>Postal Code:4119</i> SELECT THIS STORE	Samios Townsville <i>Street Name: Michael Ave</i> <i>Postal Code:4506</i> SELECT THIS STORE
Samios Warana <i>Street Name: Wyndham Street</i> <i>Postal Code:4305</i> SELECT THIS STORE	Samios Labrador <i>Street Name: Old Pacific Highway</i> <i>Postal Code:4210</i> SELECT THIS STORE	Samios Carole Park <i>Street Name: Nerang Southport Road</i> <i>Postal Code:4215</i> SELECT THIS STORE

60 Stores found

1 2 3 4 5 >

VIEWING ACCOUNT STATEMENTS

If you already have an account with Samios all of your previous account details will be available on the Samios website. If you have a new Samios account, whether you purchase online or in store, your full order history invoices, statements, etc. will be available within the account section as they occur.

To view account statements

- Go to the 'My Account' -> 'Account Statements' section.
- To receive the current month's statement, click the 'Download' button.
- To have historical statements emailed to you, select the month and year you wish to receive, enter the email address and click the 'Send Email' button.

Your Account

- Profile
- Address Book
- Payment Details
- My Quotes
- Order History
- My Replenishment Orders
- Manage My Favourites
- Account Statements**
- View / Pay Invoices
- Historical Invoices
- Change Store
- Price File

Account Statements

CURRENT MONTH STATEMENT

Download Current Month Statement: [Download](#)

EMAIL HISTORICAL STATEMENTS

Please Select Month and Year

Email:*

[Send Email](#)

VIEWING AND PAYING OUTSTANDING INVOICES

One new feature is the ability to pay your invoices online. You can view and pay invoices by selecting 'View/Pay Invoices' within the 'My Account' page. Any outstanding payments will show the outstanding dollar value. Paid invoices will display '\$0' as their value.

To pay an invoice:

- Tick the boxes in the 'Select for Payment' column for the invoices you wish to pay.
- Scroll either to the top or the bottom of the page and click the 'Make Payment' button.
- Fill in the payment details. If you have stored a credit card for future payments you may select the 'Use a Saved Card' button. The form will be automatically filled with the saved details.

Products About Us News & Promotions Careers Contact Us

HOME > MY ACCOUNT > MANAGE INVOICES

Your Account VIEW / PAY INVOICES

Profile Selected Invoices for Payment 2 Total Outstanding Invoices 62 **Make Payment**

Address Book Payment Amount \$59.44 Total Outstanding Amount \$2126.23

Payment Details

My Quotes	DATE	INVOICE	VALUE	SELECT FOR PAYMENT
Order History	30/09/2015	101193069	\$0	<input type="checkbox"/>
My Replenishment Orders	30/09/2015	101193070	\$0	<input type="checkbox"/>
	30/09/2015	101193071	\$0	<input type="checkbox"/>
Manage My Favourites	30/09/2015	101193072	\$0	<input type="checkbox"/>
Account Statements	30/09/2015	101193073	\$0	<input type="checkbox"/>
View / Pay Invoices	30/09/2015	101193074	\$0	<input type="checkbox"/>
	30/09/2015	101193075	\$0	<input type="checkbox"/>
Historical Invoices	30/09/2015	101193076	\$0	<input type="checkbox"/>
Change Store	30/09/2015	101193077	\$0	<input type="checkbox"/>
Price File	30/09/2015	101193078	\$0	<input type="checkbox"/>
	30/09/2015	101193079	\$0	<input type="checkbox"/>
	30/09/2015	101193080	\$0	<input type="checkbox"/>
	30/09/2015	101193081	\$0	<input type="checkbox"/>
	30/09/2015	101193083	\$0	<input type="checkbox"/>
	30/09/2015	101193084	\$7.07	<input checked="" type="checkbox"/>
	30/09/2015	101193085	\$62.37	<input checked="" type="checkbox"/>
	30/09/2015	115136485	\$0	<input type="checkbox"/>
	30/09/2015	115136484	\$0	<input type="checkbox"/>
	28/06/2015	115135528	\$237.66	<input type="checkbox"/>
	24/06/2015	154062619	\$175.04	<input type="checkbox"/>
	24/06/2015	115135379	\$159.07	<input type="checkbox"/>

HELPFUL TOOLS IN THE ACCOUNT

REPLENISHMENT ORDERS

Replenishment Orders are the fastest and best way to ensure your trucks are always stocked with the items you need mostly.

Replenishment orders can occur as frequently or infrequently as you would like, whether it be from daily to monthly. Setting up a replenishment order is as simple as creating an order online.

The screenshot shows a web interface for creating a replenishment order. At the top, there is a navigation bar with links for Products, About Us, News & Promotions, Careers, and Contact Us. The main form is divided into three numbered sections: 1. COST CENTER, 2. DELIVERY MODE, and 3. STORE PICKUP. Section 1 includes a dropdown menu for 'COST CENTER' (selected: SAM13817_COSTCENTER) and a text input for 'P.O.No.' (51786941). Section 2 shows 'Pick Up In Store (pick-up-in-store)' with a cost of '- \$0.00' and an 'Edit Delivery Method' button. Section 3 displays the store address: 'Miller Street, 16, Murramie 4172, Australia' with an 'Edit Delivery Address' button. Below these sections is a checkbox for 'I HAVE READ AND AGREE WITH THE TERMS & CONDITIONS' and two buttons: 'Schedule Replenishment' and 'PLACE ORDER'. The 'SET REPLENISHMENT SCHEDULE' section offers three activation options: 'Activate daily' (selected), 'Activate weekly', and 'Activate monthly'. The 'Activate daily' section includes a 'Schedule start date' (09/05/16) and a 'Replenish every' dropdown set to '14' days. The 'Activate weekly' section includes a 'Send every' dropdown set to 'Sunday' and an 'Every' dropdown set to '1' weeks. The 'Activate monthly' section includes a 'Send on the' dropdown set to '1' day/month. At the bottom right of the schedule section are 'Cancel' and 'Place Replenishment Order' buttons.

To setup a replenishment order:

1. Browse the Samios shop for all the items you want in your order and add them to the shopping cart.
2. Click the cart at the top right of the page to go to the Shopping Cart.
3. Review the items you want. Please make sure the quantities are correct.
4. Proceed to the Checkout by clicking on the Checkout button.
5. Select the cost centre and purchase order number, along with the delivery mode.
6. Click 'Schedule Replenishment' button.
7. Select the date you want the replenishment schedule to start.
8. Select one of the time frames and adjust it to how you want the order to be filled.
9. Click 'Place Replenishment Order'.

PRICE FILES

Price files can now be ordered directly through the website. These are now automatically generated and will be emailed to the address you provide. Please be patient and only send through the request once. Price files may take up to a couple of hours to be generated and emailed, depending on server loads.

Products About Us News & Promotions Careers Contact Us

HOME > MY ACCOUNT > REQUEST PRICE FILE

Your Account

- Profile
- Address Book
- Payment Details
- My Quotes
- Order History
- My Replenishment Orders
- Manage My Favourites
- Account Statements
- View / Pay Invoices
- Historical Invoices
- Change Store
- Price File

PRICE FILE

Request Price File

STORE ID*

EMAIL ID*

FILE FORMAT* ▼

CREATE PRICE FILE FOR TOP* PRODUCTS

To download a Price File please complete the following steps:

- Go to 'My Account' -> 'Price File'.
- Select the branch you wish to receive the price file from. Start typing in 'Samios' followed by the suburb of your branch and an auto complete will appear with all the branches available.
- Complete the rest of the details, including the file format type and the number of products you want to get a price file for.

FAVOURITES

Are there products you're constantly ordering? Your 'Favourites' can now be saved into different lists to help manage your product orders more effectively. Simply select your Favourite items from your list and add them into the shopping cart to create your order.

If you hit the '+Add To Favourite' button within a product's details, the product will be added to your default Favourites list. The default Favourites list is selected in the 'Manage My Favourites' page, within the 'My Account' section.

To move a product from one Favourites list to another:

- Find the product you wish to move.
- Select the list you want to move the product to from the drop down box on the product.
- Click the 'Move Product' button on the product and it will move into the new list.

To create a new Favourites list, add the name and description of the list to the form at the bottom of the Favourites page and click the 'Create Favourite List' button.

To change the default Favourites list simply select the list you want as the default list from the dropdown at the bottom of the Favourites page and click 'Change Default Favourite List'.




Home Products About Us News & Promotions Careers Contact Us

HOME > MY ACCOUNT > MANAGE FAVOURITES

YOUR ACCOUNT

- Profile
- Address Book
- Payment Details
- My Quotes
- Order History
- My Replenishment Orders
- Manage My Favourites**
- Account Statements
- View / Pay Invoices
- Historical Invoices
- change.Store
- Price File

MANAGE MY FAVOURITES

FAVOURITE LIST NAME	ACTION
<input checked="" type="radio"/> Drain	Default Favourite
 101005 PIPE DWV 50MM X 6M Choose Favourite <input type="text"/> MOVE PRODUCT	Quantity: 1 <input type="text"/> ADD TO CART <input type="button" value="Remove"/>
 RLN002240 UNI PIT W-PLASTIC GRATE SERIES 200 Choose Favourite <input type="text"/> MOVE PRODUCT	Quantity: 1 <input type="text"/> ADD TO CART <input type="button" value="Remove"/>
 103017 JUNCTION DWV PLN F&F 100MMX45 Choose Favourite <input type="text"/> MOVE PRODUCT	Quantity: 1 <input type="text"/> ADD TO CART <input type="button" value="Remove"/>

HISTORICAL INVOICES

You can now access old invoices online, you no longer have to request them from your branch. Your past invoices are in the ‘Historical Invoices’ section of your online account. You can select any number of them and have them sent to your email address.

To have Historical Invoices sent to your email:

- Go to ‘My Account’-> ‘Historical Invoices’.
- Tick the boxes in the ‘Select’ column for all the invoices you would like emailed.
- Scroll to the bottom and click the ‘Send Email’ button.

Products About Us News & Promotions Careers Contact Us

HOME > MY ACCOUNT > MANAGE HISTORICAL INVOICES

Your Account email@emailaccount.com.au **Send Email (3)**

Profile HISTORICAL INVOICES

Address Book From Date: To Date: Invoice /Order Number **Search**

Payment Details

My Quotes

Order History

My Replenishment Orders

Manage My Favourites

Account Statements

View / Pay Invoices

Historical Invoices

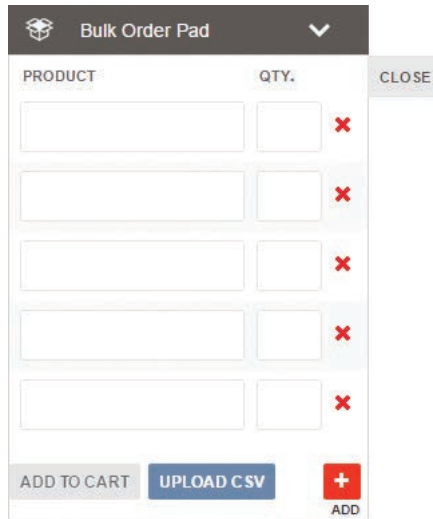
Change Store

Price File

DATE	INVOICE	SALES ORDER	P.O. NUMBER	VALUE	SELECT
30/09/2015	115138485	115200185	12345	\$7.15	<input type="checkbox"/>
30/09/2015	115138484	115200180	TEST	\$291.5	<input type="checkbox"/>
30/09/2015	101193085	101367050	123456789	\$62.37	<input checked="" type="checkbox"/>
30/09/2015	101193084	101367049	7854321	\$7.07	<input type="checkbox"/>
30/09/2015	101193083	101367046	7854321	\$7.15	<input type="checkbox"/>
30/09/2015	101193081	101367045	7854321	\$14.22	<input type="checkbox"/>
30/09/2015	101193080	101367046	7854321	\$7.07	<input type="checkbox"/>
30/09/2015	101193079	101367042	7854321	\$4.41	<input checked="" type="checkbox"/>
30/09/2015	101193078	101367042	7854321	\$9.81	<input type="checkbox"/>
30/09/2015	101193077	101367043	87854321	\$7.07	<input type="checkbox"/>
30/09/2015	101193076	101367040	87854321	\$14.22	<input type="checkbox"/>
30/09/2015	101193075	101367038	7854321	\$11.56	<input checked="" type="checkbox"/>
30/09/2015	101193074	101367037	854321	\$11.56	<input type="checkbox"/>
30/09/2015	101193073	101367038	7854321	\$2.66	<input type="checkbox"/>
30/09/2015	101193072	101367037	854321	\$2.66	<input type="checkbox"/>
30/09/2015	101193071	101367036	854321	\$7.15	<input type="checkbox"/>
30/09/2015	101193070	101367036	854321	\$4.41	<input type="checkbox"/>
30/09/2015	101193069	101367036	854321	\$2.66	<input type="checkbox"/>
16/07/2015	154063970	15458358	3100	\$31.35	<input type="checkbox"/>
16/07/2015	154063392	15457719	3252	\$1003.2	<input type="checkbox"/>
16/07/2015	115138429	115187183	ALFORD ST	\$44	<input type="checkbox"/>

BULK ORDER PAD

The Bulk Order Pad is the quickest and easiest way to add a large number of products added to the shopping cart. It can be found on the right of the main navigation bar of the home page. You simply enter the product code and the quantity you wish to add to the quote then hit the 'Add to Quote' button at the bottom of the Bulk Order Pad.



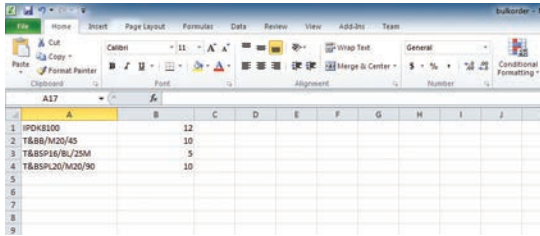
The image shows a screenshot of the Bulk Order Pad interface. At the top, there is a dark header with a shopping cart icon, the text "Bulk Order Pad", and a dropdown arrow. Below the header is a table with two columns: "PRODUCT" and "QTY.". There are five rows in the table, each with an empty input field for the product code and an empty input field for the quantity. To the right of each row is a red "X" icon. To the right of the table is a "CLOSE" button. At the bottom of the interface, there are three buttons: "ADD TO CART", "UPLOAD CSV", and a red square button with a white plus sign and the word "ADD" below it.

AUTOCOMPLETE

The Bulk Order Pad has an autocomplete function so you can find products fast. Just start typing in a product code and a list of potential products will be displayed for you to choose from. Continue typing the product code until the product you are looking for appears then select it by clicking on the product name.

UPLOAD CSV

You may also choose to upload a CSV with the list of products you wish to add to the Bulk Order pad. Simply open Microsoft Excel and in the first column, add the product codes of the products you wish to add. In the column next to the product code, add the quantity for each product. Save the file, making sure that the save file type is CSV.



The screenshot shows a Microsoft Excel spreadsheet with the following data:

	A	B	C	D	E	F	G	H	I	J	K
1	IPDK8100		12								
2	T888/M20/45		10								
3	T885P16/B/25M		5								
4	T885P20/M20/90		10								
5											
6											
7											
8											
9											

Return to the Bulk Order Pad and click the ‘Upload CSV’ button, navigate to where you just saved your CSV and select it. Provided the CSV is correct, the Bulk Order Pad will update with these products and quantities.

SETTING UP YOUR COMPANY

WHAT'S THIS SECTION?

The Samios Plumbing Supplies website now gives businesses the ability to create a hierarchical user structure, giving business manager's control over the amount of money a department or a single person is able to spend with Samios. This means the business will be able to watch the bottom line without having to micro-manage every transaction.

Company features include the ability to:

- Create an overall budget for the company;
- Manage the amount a user can spend on an order or in a time period; and
- Create a company hierarchy, departments and usergroups.

Not all the features within the 'My Company' section are required for setting up your Samios account, however if you do wish to setup the features listed above the following booklet contains the steps required to implement them.

WHO IS THIS INTENDED FOR?

The functions available within the 'My Company' account area have been targeted towards medium to large sized businesses, primarily companies that have multiple divisions or departments that require different levels of ordering permissions.

Smaller businesses will also benefit if they need to block employees from seeing account details but still allow them to order stock.



STEP 1

BUDGET

The budget you set, limits the amount your entire organisation can spend via the Samios website in a given period. The budget can also be assigned to each business unit via the cost centre.

- Click 'Manage Budgets' -> 'Create New Budget'.
- Fill out the Create Budget form.

*(*Note You can set a start date any day after the current day, allowing you to plan out your budgets over a period of time. For example, if you want to set up budgets on a monthly basis, you can set them all up at the same time.)*

The screenshot shows a web interface for creating a budget. On the left is a sidebar menu under 'MY COMPANY' with options like 'Organization Management', 'Manage Budgets', 'Manage Cost Centers', 'Manage Business Units', 'Manage Users', 'Manage Usergroups', and 'Manage Permissions'. The main content area is titled 'CREATE BUDGET' and contains the following fields:

- BUDGET ID***: A text input field with a note 'Fields marked * are required'.
- BUDGET NAME***: A text input field.
- PARENT BUSINESS UNIT***: A dropdown menu with the selected value 'sam13817_BZBUit'.
- START DATE***: A date input field with a red asterisk and 'YYYYMMDD' placeholder.
- END DATE***: A date input field with a red asterisk and 'YYYYMMDD' placeholder.
- CURRENCY***: A dropdown menu with the text 'Please select currency'.
- BUDGET AMOUNT***: A text input field.

At the bottom of the form are three buttons: 'Cancel', 'Save', and 'Back'.

STEP 2

BUSINESS UNITS

Business Units are the groups or departments within your organisation. These units are primarily used in assigning budgets to individual departments and limiting the total amount that can be spent by the company. To setup a Business Unit complete the following:

- Click 'Manage Business Units' -> 'Create New Unit'.
- Fill in the appropriate sections of the form.
- Select the parent unit of the group.
- Click 'Save Changes'.

The screenshot shows a web application interface with a navigation menu at the top: Home, Products, About Us, News & Promotions, Careers, and Contact Us. Below the menu is a breadcrumb trail: HOME > MY COMPANY > ORGANIZATION MANAGEMENT > MANAGE BUSINESS UNITS > CREATE CHILD UNIT FOR UNIT: SAM30000_B2BUNIT. On the left, a sidebar titled 'MY COMPANY' contains a list of management options: Organization Management, Manage Budgets, Manage Cost Centers, Manage Business Units (highlighted), Manage Users, Manage Usergroups, and Manage Permissions. The main content area is titled 'CREATE CHILD UNIT FOR UNIT: SAM30000_B2BUNIT' and contains a form with the following fields: 'BUSINESS UNIT ID*' (text input), 'BUSINESS UNIT NAME*' (text input), 'PARENT BUSINESS UNIT' (dropdown menu with 'sam30000_B2BUnit' selected), and 'APPROVAL PROCESS' (dropdown menu with 'Please select' selected). At the bottom of the form are three buttons: 'Cancel', 'Save changes', and 'Back'. A note at the top right of the form states 'Please use this form to update business unit details' and 'Fields marked * are required'.

STEP 3

COST CENTRES

All orders purchased on credit must be registered against a cost centre because the cost centre links to departments within the organisation's structure.

This allows you to control the amount each department can spend by creating a budget and attaching it to a cost centre.

To create a cost centre, complete the following:

- Click 'Manage Cost Centres' -> 'Create New Cost Centre'.
- Fill in the appropriate sections of the form.
- Select the parent unit of the group.
- Click 'Save Changes'.

HOME > MY COMPANY > ORGANIZATION MANAGEMENT > MANAGE COST CENTERS > ADD COST CENTER

MY COMPANY

- Organization Management
- Manage Budgets
- Manage Cost Centers
- Manage Business Units
- Manage Users
- Manage Usergroups
- Manage Permissions

CREATE COST CENTER

COST CENTER ID* Fields marked * are required

COST CENTER NAME*

PARENT BUSINESS UNIT*
sam13617_B2BUnit

CURRENCY*
AUD

Cancel Save Back

STEP 4

PERMISSIONS

There are three types of user permissions which define the amount a user can spend:

Allowed Order Threshold (per order): Sets a maximum limit a user with this budget can spend in one order.

Allowed Order Threshold (per timespan): Sets a maximum limit a user with this budget can spend within a defined time period.

Budget Exceeded Permission: Gives the user the permission to exceed any budgets created.

HOME > MY COMPANY > ORGANIZATION MANAGEMENT > MANAGE PERMISSIONS > CREATE PERMISSION - STEP 1

MY COMPANY

- Organization Management
- Manage Budgets
- Manage Cost Centers
- Manage Business Units
- Manage Users
- Manage Usergroups
- Manage Permissions

CREATE PERMISSION

Step 1 of 2

PERMISSION TYPE*

Allowed Order Threshold (per order)

Cancel Continue

Fields marked * are required

To create a new permission complete the following steps:

- Click 'Manage Permissions'-> 'Create Permission'.
- Select the permission type (style of budget) you require then click 'Continue'.
- Fill out the form with the relevant details and click 'Save' once completed.

If a user creates an order that exceeds the permissible amount the order will be forwarded onto an approver for completion.

HOME > MY COMPANY > ORGANIZATION MANAGEMENT > MANAGE PERMISSIONS > CREATE PERMISSION - STEP 1 > **STEP 2**

MY COMPANY

- Organization Management
- Manage Budgets
- Manage Cost Centers
- Manage Business Units
- Manage Users
- Manage Usergroups
- Manage Permissions**

CREATE PERMISSION

Permission type : Allowed Order Threshold (per order) Fields marked * are required

PERMISSION NAME

PARENT BUSINESS UNIT*

PERMISSION CURRENCY*

PERMISSION VALUE*

STEP 5

SETTING UP USERS

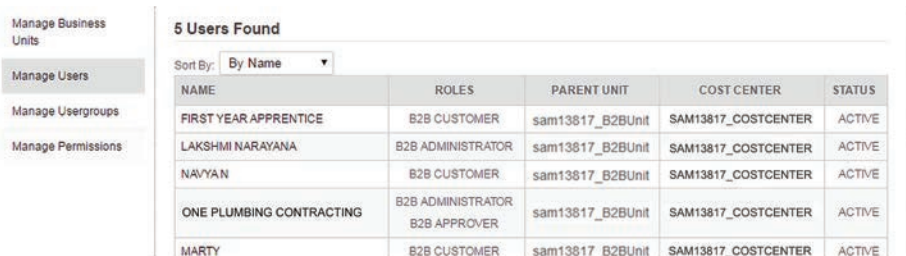
There are four roles that can be assigned to a user, each with different levels of access and permissions.

Administrator: Has control over the entire Samios account, can create users, set up users and assign cost centres.

Manager: Has access to the 'My Company' section for the purpose of updating user items. A Manager can also be assigned as an Approver.

Approver: An approver has 'My Account' permissions with an extra tab for any (pending overspend which requires approval). No access to the 'My Company' section.

Customer: Base level access only. Can (view orders they have placed).



The screenshot shows a web interface for managing users. On the left is a sidebar with navigation options: 'Manage Business Units', 'Manage Users' (highlighted), 'Manage Usergroups', and 'Manage Permissions'. The main content area is titled '5 Users Found' and includes a 'Sort By:' dropdown menu set to 'By Name'. Below this is a table with the following data:

NAME	ROLES	PARENT UNIT	COST CENTER	STATUS
FIRST YEAR APPRENTICE	B2B CUSTOMER	sam13817_B2BUnit	SAM13817_COSTCENTER	ACTIVE
LAKSHMI NARAYANA	B2B ADMINISTRATOR	sam13817_B2BUnit	SAM13817_COSTCENTER	ACTIVE
NAVYAN	B2B CUSTOMER	sam13817_B2BUnit	SAM13817_COSTCENTER	ACTIVE
ONE PLUMBING CONTRACTING	B2B ADMINISTRATOR B2B APPROVER	sam13817_B2BUnit	SAM13817_COSTCENTER	ACTIVE
MARTY	B2B CUSTOMER	sam13817_B2BUnit	SAM13817_COSTCENTER	ACTIVE

To set up new users and their level of access please complete the following:

- Click 'Manage Users' -> 'Create New User'.
- Fill out the appropriate user details.
- Select the appropriate parent unit for the user. This will determine the level of budgets the user has access to.
- Select the role (permission / access level) for the user. Just select one role as all will have base level purchasing access.
- Click 'Save Updates'.

ADD USER DETAILS

Please use this form to create a new customer Fields marked * are required

TITLE*
Please select ▼

FIRST NAME*

LAST NAME*

CONTACT NUMBER

EMAIL*

PARENT UNIT*
sam13817_B2BUnit ▼

Roles

B2B Administrator
 B2B Customer
 B2B Manager
 B2B Approver

OPTIONAL STEP 6

USERGROUPS

Assigning a User Group gives a specific user permissions they wouldn't otherwise have within their business unit, i.e. it overrides the usual business unit permissions.

HOME > MY COMPANY > ORGANIZATION MANAGEMENT > MANAGE USERGROUPS > MANAGE TESTUSERGROUP1 USERGROUP DETAILS

MY COMPANY

- Organization Management
- Manage Budgets
- Manage Cost Centers
- Manage Business Units
- Manage Users
- Manage Usergroups**
- Manage Permissions

VIEW USERGROUP DETAILS

[Edit](#) [Disable](#) [Remove](#)

USERGROUP ID :	TESTUSERGROUP1
USER NAME :	TESTUSERGROUP
PARENT UNIT :	sam13817_B2BUnit

PERMISSIONS

Permissions define the financial limits of a user. Permissions can be on a per-order or per-timespan basis. [Edit Address](#)

PERMISSION NAME	CURRENCY	VALUE	TIMESPAN	PARENT BUSINESS UNIT
2000 PER WEEK	AU DOLLAR	2000.0	WEEK	sam13817_B2BUnit

USERS

Users within a Usergroup will in-effect be assigned the Permissions of the Usergroup. [Edit](#)

USER NAME	PARENT UNIT
ONE PLUMBING CONTRACTING	sam13817_B2BUnit

In order to create a new User Group please complete the following steps:

- Click 'Manage Usergroups' -> 'Create New Usergroup'.
- Fill out the appropriate user group details.
- Select the parent unit of the group.
- Click on the newly created user group within the 'Manage Usergroups' page.
- Edit the permissions of the user group by clicking the 'Select Usergroup' button and select what level of permissions you want the group to have.
- Select which users to add to the user group by selecting them, and clicking 'Edit' from the users second of the usergroup details.

MY COMPANY

- Organization Management
- Manage Budgets
- Manage Cost Centers
- Manage Business Units
- Manage Users
- Manage Usergroups**
- Manage Permissions

CREATE USERGROUP

Please use this form to update usergroup details. Fields marked * are required.

USERGROUP ID*

USERGROUP NAME*

PARENT BUSINESS UNIT

sam13817_B2BUnit

Cancel Save Updates Back

OPTIONAL STEP 7

EDITING A USER

Once you've created a user you may want to add them to a user group, change their parent business unit, or give them a specific permission level. This can be done by clicking 'Manage Users' within the 'My Company' section.

Approvers

You can add an extra person to be an approver for individual users. Approvers are users that have been assigned the Approver role.

Permissions

This is where you can add or edit the financial limits for a user. The limits can be either per-order or per-timespan. See Step 4 for setting up permissions.

User Groups

You can also add the user to a specific user group here. User groups give the user permissions they wouldn't otherwise have within their business unit. See 'Optional Step 6' for creating user groups.

VIEW USER: APPRENTICE@ONEPLUMBING.COM.AU

The functionality available to a user is dependent on the roles they have. In general, the visibility and jurisdiction of a user is restricted to the branch of the unit to which they are assigned.

[Edit](#)[Disable User](#)

EMAIL:	APPRENTICE@ONEPLUMBING.COM.AU
TITLE:	MR
FIRST NAME:	FIRST YEAR
LAST NAME:	APPRENTICE
CONTACT NUMBER:	0705555555
PASSWORD:	RESET PASSWORD
PARENT BUSINESS UNIT:	SAM13817_B2BUNIT
USER ENABLED STATUS:	ENABLE

ROLES

A user is an individual who is able to login to the Samios Store. The functionality available to a user is dependent on the roles they have. B2B Administrators have access to the My Company area to modify the organization hierarchy. B2B Managers can view statistics on the sales of the organization (awaiting implementation). B2B Approvers can approve orders for which the B2B Customer did not have enough permissions. B2B Customers can place orders in the Samios Storefront.

ROLES

B2B CUSTOMER

APPROVERS

The approval process will assign orders to approvers if the customer placing the order has insufficient permissions to do so. By default approvers are picked from the organization hierarchy, but additional approvers can be assigned to a specific customer here.

[Edit](#)

NAME	EMAIL	ROLES	ACTIONS
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PERMISSIONS

Permissions define the financial limits of a user. Permissions can be on a per-order or per-timespan basis.

[Edit Permission](#)

MANAGE PERMISSIONS	CURRENCY	VALUE	TIMESPAN	PARENT BUSINESS UNIT	ACTIONS
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USER GROUPS

Usergroups allow you to assign permissions to multiple customers without adhering to the hierarchical structure of the organization hierarchy.

[Edit User Group](#)

ID	NAME	PARENT UNIT	ACTIONS
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CLOUD INVOICE INTEGRATION

SIMPRO AND LINK4

We continuously update and improve the Samios Plumbing Supplies website and now our customers can integrate with third party, cloud software systems, such as **simPRO** and **Link4**. The integration is seamless as it will allow you to connect your online Samios account to **simPRO** and cloud accounting software such as **MYOB** or **Xero** using **Link4**, in relatively simple steps.



SIMPRO

AUTOMATED CATALOGUE UPDATES (PRICING AND PART NUMBERS)

The Samios-simPRO integration enables you to automate updates to your catalogue price and part number files. To link your Samios catalogue to simPRO:

- Log into your simPRO account.
- Click 'Utilities' -> 'Import'.
- From the 'Imports' Menu on the left, click 'Catalogue' -> 'Samios'.
- Enter your Samios account username (*sam12345*) and password.

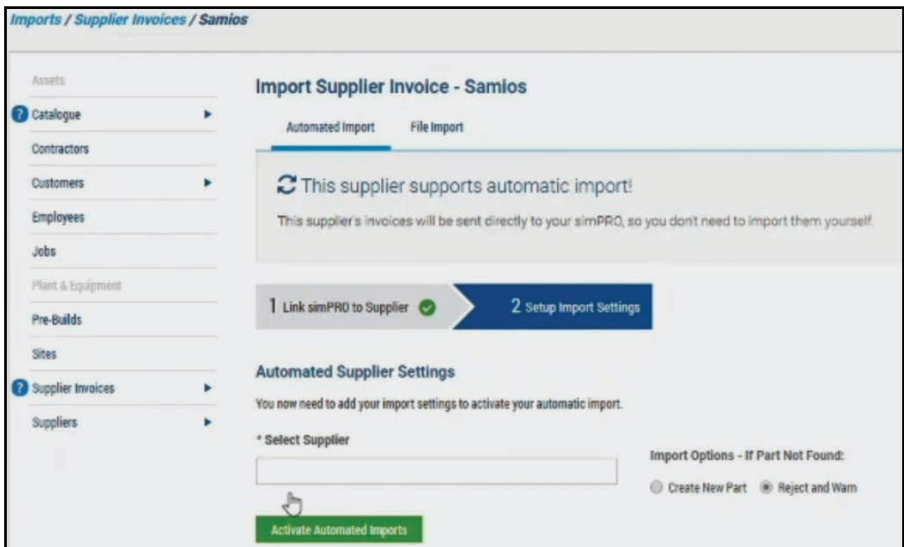
The screenshot displays the 'Import Catalogue - Samios' interface in simPRO. On the left, a navigation menu lists various categories, with 'Suppliers' selected. The main area is titled 'Import Catalogue - Samios' and features two tabs: 'Automated Import' (selected) and 'File Import'. A prominent message states, 'This supplier allows automatic syncing!', followed by a sub-message: 'Automatic syncing keeps your catalogue up-to-date by importing new updates automatically when pro...'. Below this, two steps are outlined: '1 Link simPRO to Supplier' (highlighted with a blue arrow) and '2 Setup Import Settings'. A text prompt reads, 'To begin, enter your login details for this supplier below. This allows simPRO to access to your supplier catalogue pricing.' The form includes fields for '* User ID' (containing 'sam37000') and '* Password' (masked with dots). A blue 'Validate' button is positioned at the bottom of the form.

Once you have validated using your credentials, select your supplier in the 'Select Supplier' field. Click the 'Activate Automated Imports' button. A success message will be displayed: *'Automated imports are active for this supplier'*.

AUTOMATED INVOICING

To enable automatic invoicing for your Samios-simPRO integration:

- Log into your simPRO account.
- Click 'Utilities' -> 'Import'.
- From the 'Imports' Menu, select 'Supplier Invoices' -> 'Samios'.
- Enter your Samios account username (*sam12345*) and password.
- Select your supplier from the 'Select Supplier' field.
- Click the 'Activate Automated Imports' button.



For a comprehensive video tutorial, use the following link:

<https://samios.net.au/simpro>

LINK4

SEAMLESS INVOICE DELIVERY

Introducing seamless invoice delivery with the Samios-Link4 integration.

If your business uses cloud accounting software such as **MYOB** and

Xero you can activate the e-invoicing service using Link4. Receive

invoices straight into your accounting software (**MYOB or Xero**), at no

cost to you or your business.



LINK4

HOW TO ACTIVATE LINK4

You can activate your e-invoicing service with Link4 in three steps:

- Enter the following link to open the Samios-Link4 portal.
https://secure.link4.cloud/samios_signup.php
- Input all the required information, including your Samios account number.
- Inform your local Samios branch/store that you would like your invoices to be sent to Link4.

For more information, visit the Samios website and check out the Link4 page at <https://samios.net.au/sam/en/AUD/samios-link4>

MOVING PURCHASING TO ECOMMERCE

**POWERFUL SEARCH AND RICH
PRODUCT INFORMATION.**

**LIVE CONTRACT PRICING AND
PRODUCT AVAILABILITY.**

**FULL ORDER AND DISPATCH
HISTORY FOR ALL ONLINE AND
OFFLINE ORDERS.**

**SELF-SERVICE ORGANISATION
AND PURCHASING
MANAGEMENT.**

ORDER APPROVAL WORKFLOW.

**PURCHASING OR ACCOUNT
PAYMENT SECURELY FOR ALL
MAJOR CREDIT CARDS.**

LEARN MORE AT
samios.net.au/faqOrHelp