



# VBH24 Customer Portal

Optional Approvals Process

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### The easier way to order your hardware and manage your account with VBH

- Manage your ordering and Users
- Place orders
- Check prices
- Check stock
- Improved product search
- Set up Order Templates for quick ordering
- CSV upload option for quick bulk orders
- Order using our Product Configurator (bi-folds, tilt and turns etc)
- Set up Approvals processes
- Set up Cost Centres
- Set up automatic 'Subscription' orders (coming soon)
- Compare items
- View Order History and re-order from there
- View & download images, drawings, guarantee info, certification by item
- View & download invoices and delivery notes
- View catalogues and literature

**This is another optional feature, but one that may be of use for companies with multiple Users who have different levels of authority within the company.**

**When the Account Admin sets up a new User, they can set them a Maximum Order Value budget, and a Maximum Spend budget per day, week, month or quarter, as per the example here.**

Ben Shephard	Order spend limit	0 order(s)
	£ 500.00	
	Budget (Weekly)	
	£ 1,000.00	
	<input type="text"/>	

These limits are set in the Users area of the portal (within My Organization).

**If the user places an order that is within both criteria, it will be transmitted direct to VBH. However if one of the criteria is not met (e.g. the User in the example above places an order for more than their max. order value) or places 3 orders in a week totalling more than their weekly budget, an email message will go to an Approver within your company advising that there is an order to approve. The Approver then has the choice to override the limits and release the order (it will then come to VBH automatically), or reject it. In both cases, the User will receive an email advising which decision has been made.**

## Approval Details

Requisition ID: 00000401  
Order Reference ID: Ben Test  
Purchaser: Ben Shephard  
Creation Date: 08/08/23  
Total: £ 215.50  
Approval Status: Pending Approval

### Buyer approval

Purchaser:	Ben Shephard	
Order Spend Limit:	£ 100.00	£ 215.50
Weekly budget:	£ 100.00	£ 179.50   £ 215.50
Already spent:	£ 179.50	(179.5 %)
Including this order:	£ 395.00	(395 %)

Reject Approve

***Until the Approver actions the approval request, the User will see their order in the Pending Orders folder. Once the order has been rejected it will sit in the Rejected Orders folder.***

### Rejected Purchases Requisitions

Requisition ID	Creation Date	Approver	Rejection Date	Line Items	Total	
00000401	09.08.2023	Gary Gleeson	09.08.2023	1	£ 215.50	<a href="#">Details</a>
00000253	26.07.2023	Gary Gleeson	26.07.2023	1	£ 715.20	<a href="#">Details</a>

***Approvers can be set up by the Account Admin in the Users area of the portal (My Organization).***

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**We hope that you find the VBH24 Customer Portal to be a useful tool but we understand that nothing is always plain sailing.**



**These notes should cover most things but if you have an issue or don't understand something, contact us and we'll get you up and running in no time**  
Email: [marketing@vbhgb.com](mailto:marketing@vbhgb.com) (ideally with a screenshot showing your issue)

*Remember: You will be unable to access the VBH24 Portal if your account is on hold for payment or is outside its credit limit. This is usually the reason why people have trouble logging on, so give those a check if you are having trouble.*

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**Thank you for using the VBH24 Customer Portal.  
It's more than just a webshop**

