Requisition|Purchase Order Module

Allows you to create and approve documents via a web browser

Quick Start Guide

Microix Workflow (WFM) Modern utilizes a single-page navigation approach, designed to enhance usability by streamlining tasks and focusing on one view at a time. This cleaner, more intuitive design ensures a seamless and improved user experience. The navigation menu mirrors the interface of Office Web Applications, offering users a familiar and user-friendly environment.

Quick Reference for our organization

My Role (Microix Basic Roles)	Organization Name and Account Number	Main Contact for our Microix & MIP FA needs
☐ Requester ☐ Approver ☐ Microix Admin		

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(Tip: Ctrl + Click to follow link)

For client upgrading, the Microix Administrator will review version 2025 including breaking changes in this link Whats New

Quick Overview *(Return to Top)*

(Please include your organization's process and procedures related to the Requisition | Purchase order Module here)

Microix Roles

The Microix roles are assigned as Requester, Approver and Microix Admin. A user can be assigned to every role or designated to a specific role.

A **Microix Admin** has full access to administer Workflow Module application and user security. This varies from the role of a **Requester** which could create and submit orders for approval, whereas an **Approver** can authorize or reroute orders in Workflow Modules.

The table below displays the Requisition/PO Module menu item access according to roles.

REQUESTER ACCESS	APPROVER ACCESS
▪ My Documents ▪ Shopping List ▪ Receiving ▪ Vendor Punchout ▪ Vendor List ▪ Customer List ▪ Send Order to Vendor	▪ Account List ▪ Approve Documents ▪ Document Search ▪ Display Account Balance

Access and Login Information for Microix Workflow Modules Modern

This section walks you through accessing and changing your default password for **Microix Workflow Modules Modern**.

Default Password Information

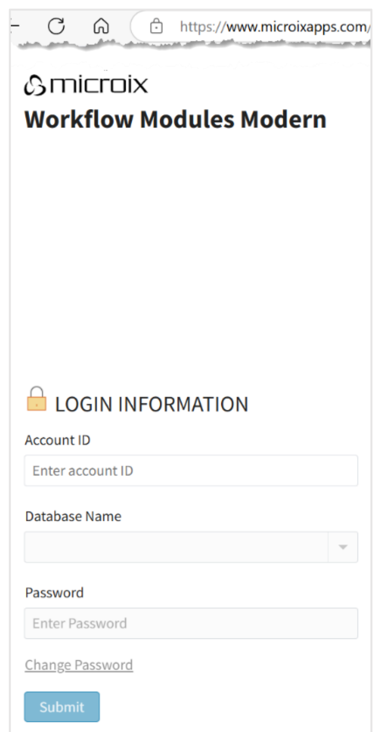
- **Default Password**: Each user's default password is their **last name in all lowercase**.
- You **must change your password** upon first login.
- Password requirements:
  - Minimum **6 characters**.
  - Must include **uppercase, lowercase, digits**, and at least **1 special character**.

If you forget your password:

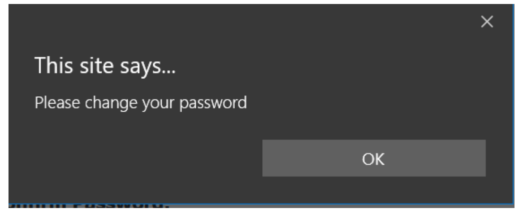
- Click the hyperlink to retrieve your password via email.
- Contact your admin to reset it to the default (your last name in lowercase).

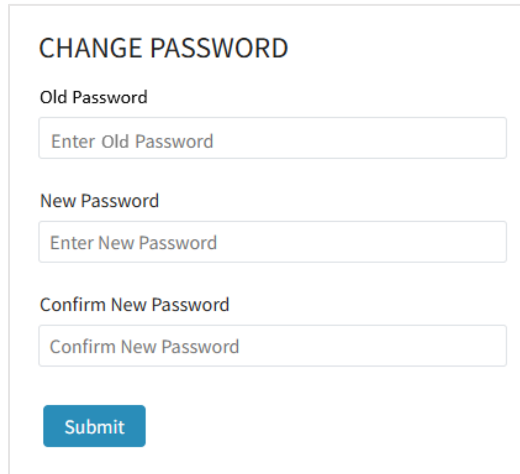
Steps to Access Microix Workflow Modules Modern

1. **Open a Web Browser**:
   - Navigate to **www.microixapps.com/login**.
2. **Enter Login Credentials**:
   - Input your **Account ID** (not case-sensitive).
   - Select the appropriate **Database**, if required.
   - Enter your **Password**.
3. **Submit Credentials**:
   - Click the **Submit** button.



Changing Your Password



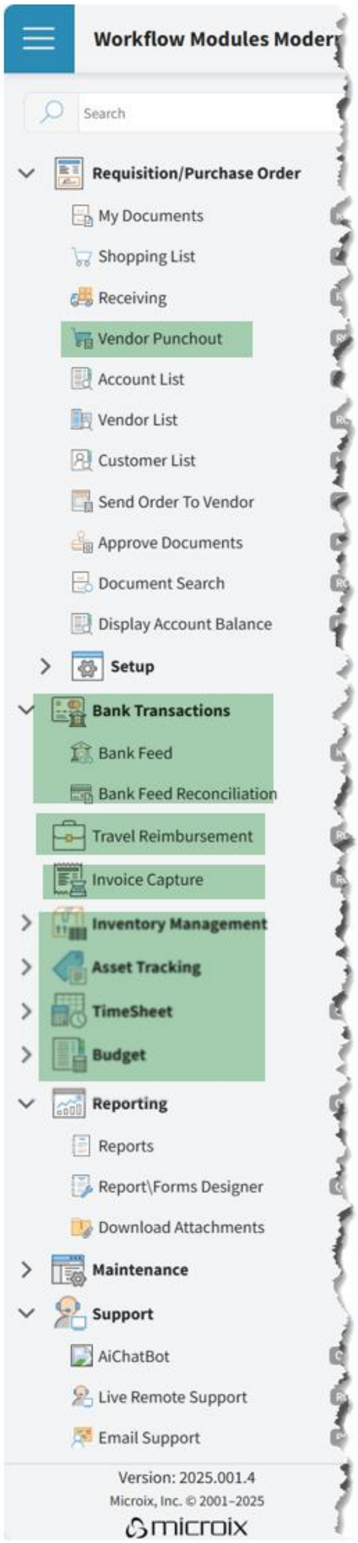


1. **Prompt to Change Password**:
   - Upon login, a pop-up will appear requesting you to change your password. Click **OK** to proceed.
2. **Input Old Password**:
   - Enter your current (default) password.
3. **Create New Password**:
   - Enter your desired new password that meets the requirements.
   - Confirm your new password by re-entering it in the **Confirm New Password** field.
4. **Save Changes**:
   - Click **Submit** to save the new password.

Password Recovery

- If you forget your password:
  - Use the **“Change Password”** link on the login page.
  - Alternatively, contact your admin for assistance.

Drop-down available menu options [(Return to Top)]



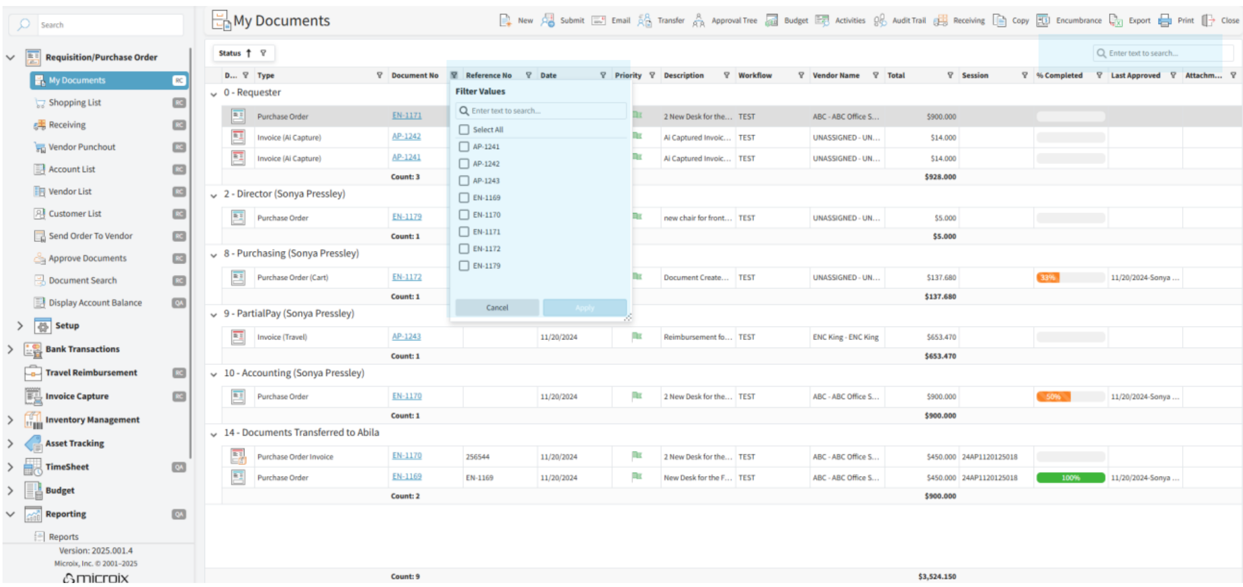
DROPDOWN MENU TAB	DESCRIPTION
Requisition|Purchase Order Module	Includes the Requester and Approver User Options
My Document	This is a standard list of all user-created documents. You will be able to create, edit and/or search for your document.
Shopping List	Provides a method for users to add and maintain the items that are available for selecting on a purchase request. This allows users to add line items to their purchase requisition without having to enter the entire information manually
Receiving	Receive goods or services that you have acquired. (*Please refer to your internal policies on whether this process is required)*
Vendor Punchout	Optional add-on for this module-Please refer to your internal policies on whether this process is required.
Account List	List/search active account codes from MIP Fund Accounting.
Vendor List	List/search all active vendors from MIP Fund Accounting.
Customer List	List/search active customers from MIP Fund Accounting.
Send Order to Vendor	Please refer to your internal policies on whether this process is available or required) via PunchOut, fax (requires internet fax account), or email.
Approve Document	Approve any purchase or check request.
Document Search	View the status of documents which you have approved or are scheduled to approve.
Display Account Balance	View a summary of the department/funding budget balance.
Setup	Microix Admin Role-Includes the Fund Source, Vendor Punchout Setup, Shopping List Maintenance and Credit Card Assignment
Bank Transactions	Optional add-on for this module - Includes the Bank Feed and Bank Feed Reconciliation
Travel Reimbursement	Optional add-on for this module-Users create a New Travel Reimbursement for Flight, Lodging, Meals, Rental, Supplies, and Mileage
Invoice Capture	Optional add-on for this module- Drag & drop invoices and email capture for processing
Inventory Management	Optional add-on Module - Includes the Requester and Approver User Options
Asset Tracking	Optional add-on for Asset tracking only - Includes the Requester and Approver User Options
Timesheet	Optional add-on Module - Includes the Requester and Approver User Options
Budget	Optional add-on Module - Includes the Requester and Approver User Options
Reporting	Run Requisition/Purchase Order reports and Download Attachments
Maintenance	Microix Workflow Maintenance etc. Admin Role
Support	AI chatbox, Live Remote support, email support

Requester User Options *(Return to Top)*

My Documents

How to Find My Document

This section displays a list of all requisitions, AP invoices and encumbrance modifications **created by the logged in user.** You can find a document easily by navigating to **Requisition/Purchase Order** and select **My Document** from the menu list (*If all the menu Items are disabled, contact your administrator to grant access to the items related to your role.)*



How to Find My Document:

1. **Log in** to Workflow Modules Modern.
2. **Navigate to the left-side menu** and locate the **Requisition/Purchase Order** section.
3. Click on **My Documents** from the menu list.
4. The **My Documents** section will display a list of all requisitions, AP invoices, and encumbrance modifications created by the logged-in user.
5. Use the **search bar** or apply **filters** (such as Status, Type, or Document No.) to quickly locate a specific document.

Buttons	Description
New	Create a new purchase request/check request document.
Submit	Submit existing document that are not yet submitted for approval.
Email	Email members for response.
Transfer	Transfer document ownership to another team member within the workflow
Approval Tree	Review the automated authorization process for each document
Budget	Check the budget for availability for each item
Activities	Review the document activity
Audit Trail	Review the approval process and changes within by user and date stamp
Receiving	Verify items received on Purchase Orders
Copy	Copy an existing document to update and attach new details
Encumbrance	Modify or apply an invoice to an Encumbrance
Export	Download an Excel copy of the My Documents queue
Print	Print a copy to screen after selecting a document (see Document Search)
Close	Close and return to the home screen.

How to Create a Document from My Documents

There are three ways to produce a Purchase Order in Workflow Modules: My Document, the Shopping List, and Vendor Punchout. The section will focus on creating a PO manually through My Documents.

NOTE: *The system may automatically populate specific fields on the form. If you find any discrepancies, please notify your Administrator.*

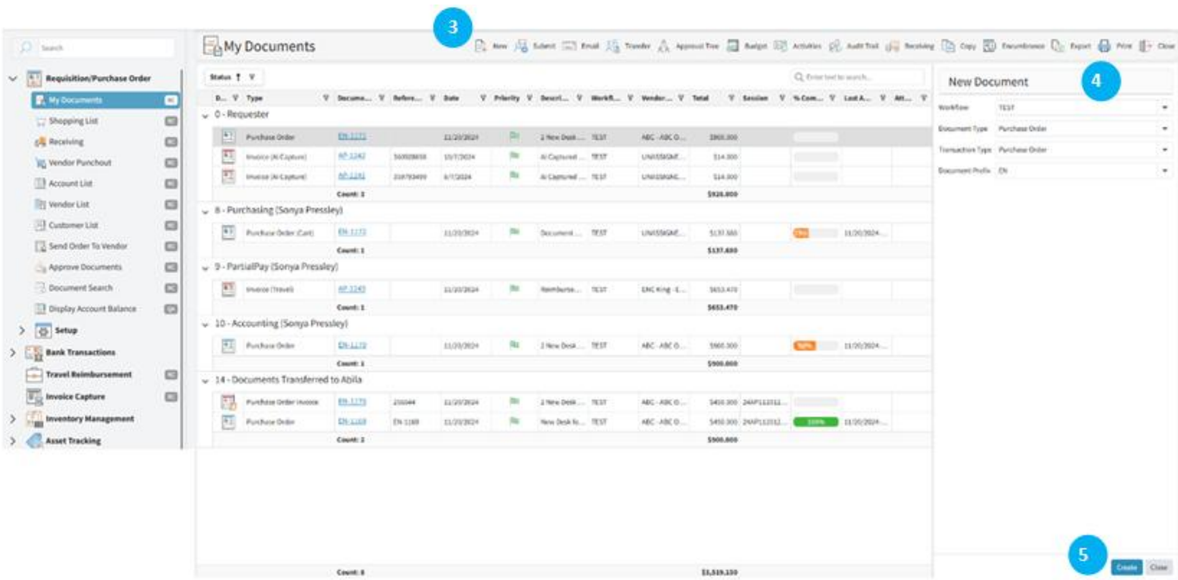
1. **Log in** to Workflow Modules Modern.
2. **Navigate to the left-side menu** and click on **Requisition/Purchase Order** → **My Documents**.
3. In the **My Documents** section, click the **New** button (● Step 3 in the image on the next page).
4. **Access the New Document Creation Panel** on right side of the screen to select the **type of document** you want to create (● Step 4 in the image on the next page).

- Fill in the New Document required details :
    - **Workflow**: Select the relevant workflow process (e.g., TEST).
    - **Document Type**: Choose the type of document to create (e.g., Purchase Order).

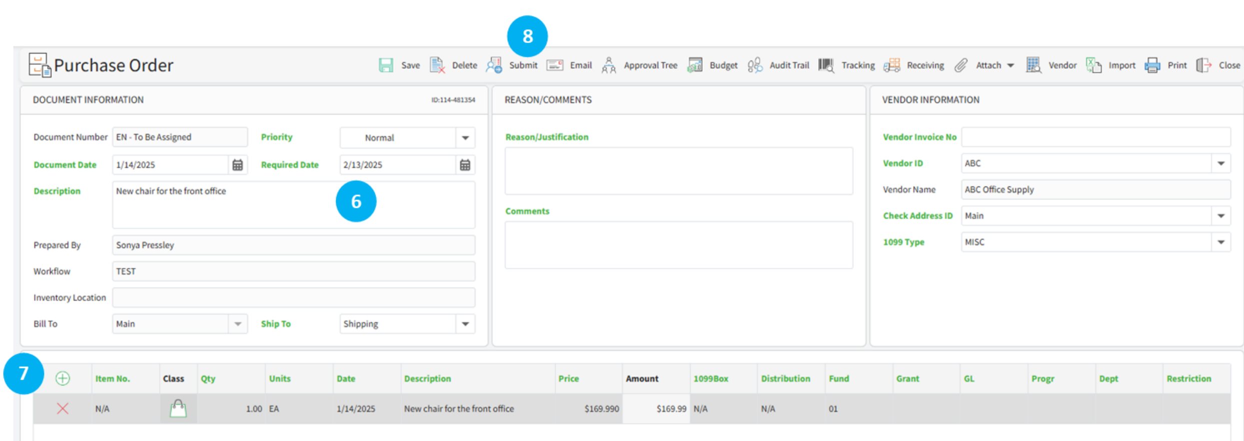
- **Transaction Type**: Ensure the correct transaction type is selected (e.g., Purchase Order).
- **Document Prefix**: Select or enter the appropriate prefix for the document.

5. **Create the Document**

- Click the **Create** button at the bottom of the panel to generate the new document (● Step 5 in the image).



6. Fill in the required details such as **Document Type, Description, Vendor Information, Amount, and Workflow Assignment** (● Step 6 in the image).
7. In the **Document Detail** section, click on the to start new line or row to enter each product or service you plan to acquire (● Step 7 in the image).
8. Click **Save** to store the document as a draft or click **Submit** to proceed with the approval workflow (● Step 8 in the image).
9. Once submitted, the document will appear in the **My Documents** list, where you can track its progress.



Buttons	Description
Save	Save the document
Delete	Delete the document
Submit	**Submit** your document for approval
Email	Send an **Email** correspondence
Approval Tree	Displays the automated document routing approval
Budget	Check the account information against the budget
Audit Trail	The **Audit Trail** tracks changes within the document
Tracking	Review tracking information for an item
Receiving	Confirm receipt of an order and attach the packing slip
Attach	**Attach** any electronic document to your document
Vendor	Search and view a list of **vendors**
Import	**Import** documents
Submit	**Submit** your document for approval
Print	**Print** a copy of your document.
Close	**Close** and return to the home screen

Fields	Description
Document No.	Assigned automatically upon saving.
Description	Enter a general description of the item(s) being purchased/requested.
Prepared by	Your name will appear in this field. The information is retrieved from Abila™ MIP employee database (read-only field).
Workflow	The system will automatically default your Workflow in this field. If you belong to multiple workflows, click on the down arrow to select a different workflow ID.
Document Date	The current date will be defaulted in this field.
Required Date	Ten days after the order date this will be defaulted for the required date, it can be changed.
Bill to	Accept the default or change it based on your internal policies.

Document Information (Return to Top)

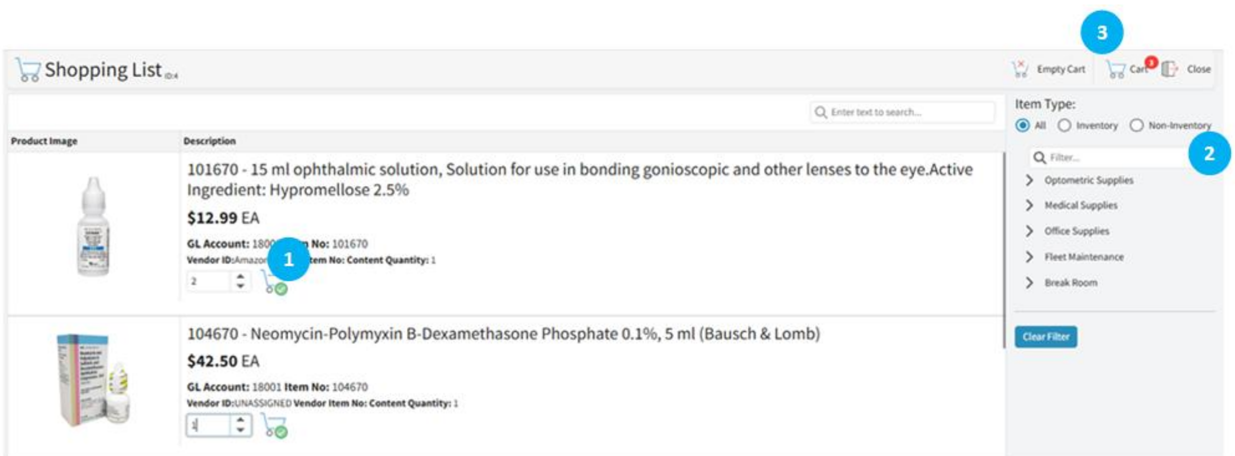
Fields	Description
Document No.	Assigned automatically upon saving.
Description	Enter a general description of the item(s) being purchased/requested.
Prepared by	Your name will appear in this field. The information is retrieved from Abila™ MIP employee database (read-only field).
Workflow	The system will automatically default your Workflow in this field. If you belong to multiple workflows, click on the down arrow to select a different workflow ID.
Document Date	The current date will be defaulted in this field.
Required Date	Ten days after the order date this will be defaulted for the required date, it can be changed.
Bill to	Accept the default or change it based on your internal policies.
Ship to	Accept the default or change it based on your internal policies.
Reason/ Justification	Optional or it may be required based on your internal policies.
Comments	Enter any comments that will provide additional information or special instructions to vendors and/or approvers. This field will also be included on the printed form.
Vendor Invoice No	Insert the documents invoice number
Vendor ID	Enter the vendor ID or use the drop-down to search for a specific vendor.
Vendor Name	The vendor name will automatically populate in this field after selecting a vendor ID

Document Detail Information

Columns	Description
Item No	You may skip this column or enter the vendor item/catalog number.
Quantity	Enter the number of items to be purchased.
Units	Select the unit type (ea., box, pack). If the list does not contain a specific unit type, contact your Administrator and they can add it for you.
	The system will default to the current date.

Date	
Vendor ID	Optional field (consult with your Administrator).
Description	Enter a brief description of the item being purchased such as color, size and/or specs.
Price	Enter cost of the service or product.
Amount	Default field- system will automatically calculate the quantity ordered with the unit cost.
Distribution Code	Optional (consult with your Administrator).
Fund, GL, Grant, Dept, Restriction	Organization Segments, select the account codes associated with how the product or service will be expensed. (consult with your Administrator).

Shopping List



How to Create a Purchase Order (PO) from the Shopping List:

1. Select Items from the Shopping List (Step 1 in the image)

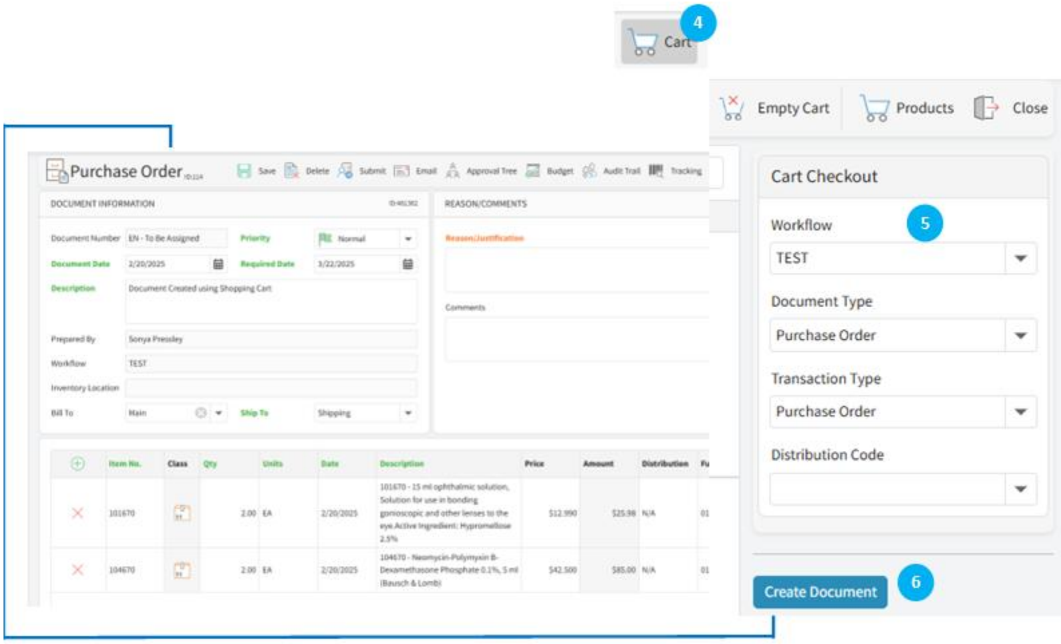
- Locate the **Shopping List** section, which displays available products.
- Browse through the list and identify the required items.

2. Use Filters and Sorting (Optional (Step 2 in the image)**)**

- On the right panel, under **Item Type**, apply filters to refine the selection (e.g., Optometric Supplies, Medical Supplies, Office Supplies).
- You can also use the **search bar** to find specific products.

3. Add Items to the Cart (Step 3 in the image)

- Click the **cart icon ( )** next to each item to add it to your cart.
- Adjust the **quantity** as needed.



4. Review the Cart Checkout

- Verify quantities, pricing, and item details before proceeding.
- Once you have added items to the cart from the **Shopping List** click on the **cart (🛒)** to complete the information (🔵 Step 4 in the image)

5. Complete the Cart Checkout

- To create the PO order from the Shopping List, complete the drop-down selection for the **Workflow, Document Type, Transaction Type.** The **Distribution Code** field is optional**.** (🔵 Step 5 in the image)

6. Create Document and Submit the Purchase Order

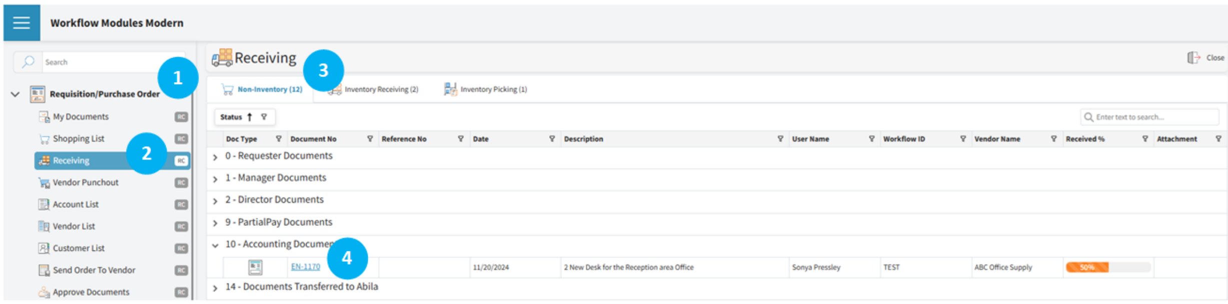
- Click on the **Create Document** button to review and **Submit** the Purchase Order (PO). (🔵 Step 6 in the image)
- The PO will be processed based on the predefined workflow for approvals.

Additional Notes:

- If you need to remove items, use the **Empty Cart** option.
- Ensure the correct **GL Account** and **Vendor ID** are assigned to avoid processing errors.
- Once submitted, track the PO status under **My Documents**.

Receiving *(Return to Top)*

The **Receiving** section displays a list of all documents awaiting receipt. Follow the steps below to navigate and access a purchase order for receiving.



Steps to View the Receiving Form:

1. **Navigate to the Main Menu**
   - Open the **Workflow Modules Modern** interface.
   - On the left-hand navigation panel, select **Requisition/Purchase Order** (● Step **1** in the image)

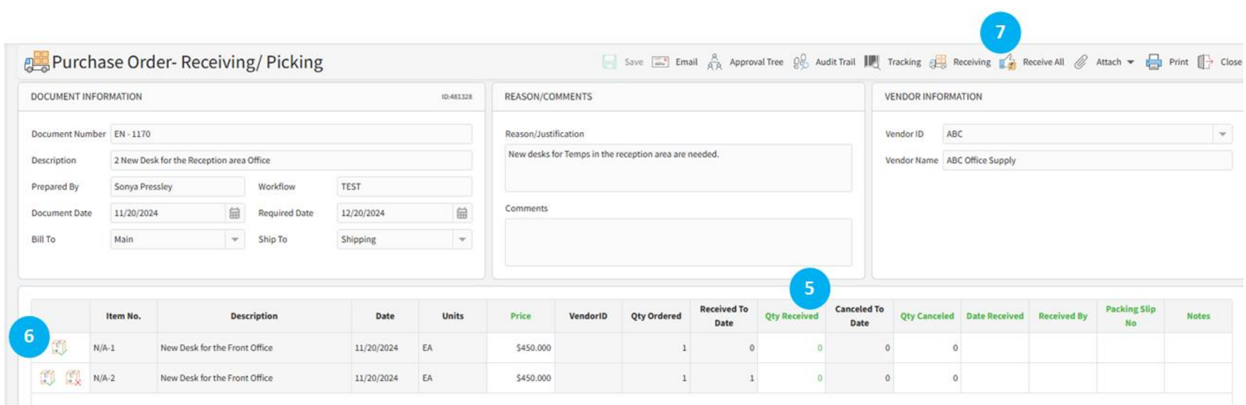
2. **Select the "Receiving" Section**
   - From the expanded menu, click on **Receiving** to access the list of purchase orders waiting to be received (● Step 2 in the image)

3. **Locate the Purchase Order and Open the Receiving Form**
   - Under the **Purchase Order Receiving List**, review the displayed rows of purchase requests. (● Step 3 in the image)

4. Review the Purchase Order Details click on the document link in the selected row to open the full form to proceed with receiving the ordered items. (● Step 4 in the image)
   - The form will display essential details, including:
     1. **Document Information** (PO number, description, dates, workflow, and shipping details).
     2. **Vendor Information** (Vendor ID, vendor name).
     3. **Reason/Comments** (Justifications or additional details).

5. Enter Received Quantities
   - Locate the **Qty Received** column in the item list (● Step 5 in the image)
   - Input the number of items received for each line item.

6. **Verify Item Information**
   - Ensure that the received quantity matches the **Qty Ordered.** (● Step 6 in the image)
   - Check that **Price, Units, and Vendor ID** details are correct
   - If any discrepancies exist (e.g., missing or damaged items), document them in the **Notes** section.
7. **Submit the Received Items**
   - Click the **Receiving** button to process the entered quantities
   - If receiving is complete, select **Receive All** to finalize the receipt of all items in the PO. (● Step 7 in the image)
8. If the document is NOT 100% received – you can reset receiving for a particular line by selecting the received line and click on the **Reset Receiving** button on left side.



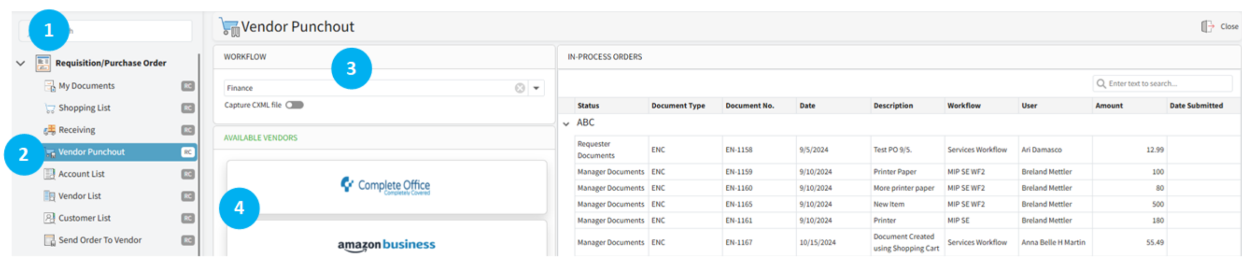
Additional Notes:

- If partial quantities are received, you can update the **Qty Received** column multiple times until all items are received.
- If items are missing or damaged, update the **Qty Canceled** column and enter comments in the **Notes** field.
- Ensure all entries are accurate before submitting the receipt to avoid reconciliation issues.

Vendor Punchout *(Return to Top)*

(Please refer to your internal policies on whether this process is required)

1. Navigate to main ribbon menu and select **Requisition/Purchase Order.**
2. Next, from the drop-down menu tab, select **Vendor Punchout** (*Note: If all the menu Items are disabled, contact your administrator to grant access to the items related to your role.)*
3. Select a **Workflow** from the drop-down list to display all associated workflows for that user
4. Double-click the Vendor button from the list of **Available Vendors** to start a new shopping cart, add items to the cart to return to Microix. Then, navigate to **My Documents** to submit for approval before sending to vendor.



5. **Track the Order Status, n**avigate to **My Documents** to monitor the order's progress. Approved orders will be processed for procurement, while rejected orders may require modifications.

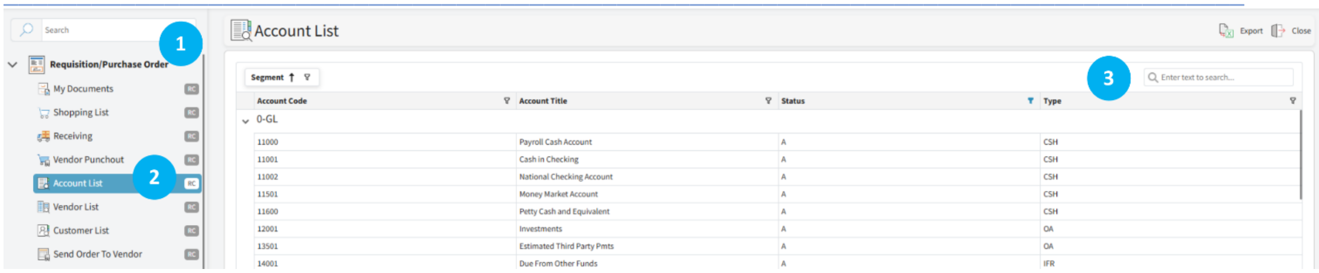
Additional Notes:

- Ensure you are selecting the correct workflow to avoid delays in approval.
- If a punchout session expires, restart the process and re-add items.

Account List

The **Account List** search active account codes from MIP Fund Accounting

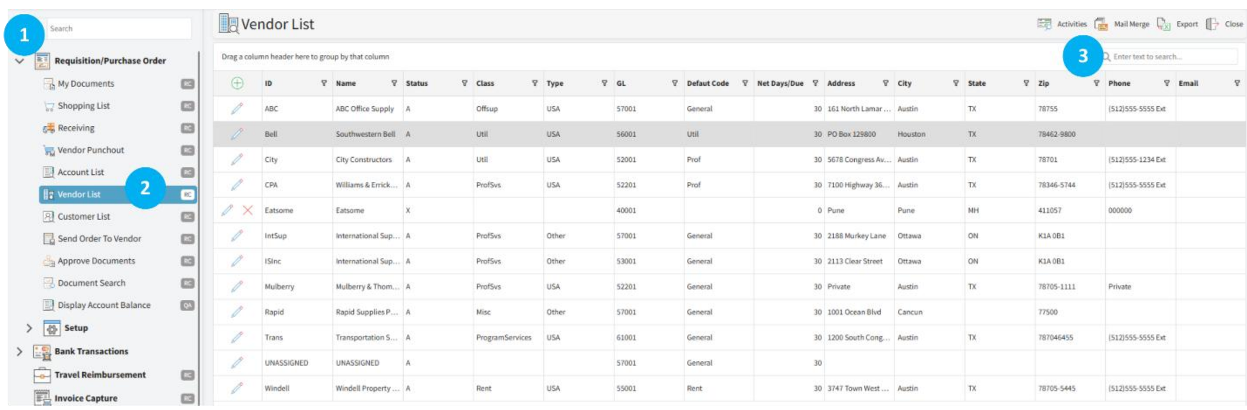
1. Navigate to main ribbon menu and select **Requisition/Purchase Order.**
2. Next, from the drop-down menu tab, select **Account List** (*Note: If all the menu Items are disabled, contact your administrator to grant access to the items related to your role.)*
3. Select a **Segment** for the drop-down list to display all the codes available for that segment, or to filter/sort data use the icon within the column headings or Enter test to search



Vendor List

The **Vendor List** all active vendors from MIP Fund Accounting. To access this form:

1. Navigate to main menu pane and select **Requisition/Purchase Order.**
2. Next, from the drop-down menu tab, select **Vendor List** (***Note:*** *If all the menu Items are disabled, contact your administrator to grant access to the items related to your role.)*
3. If you want to filter/sort data use the icon within the column headings or Enter test to search.



Customer List

The **Customer List** in Modern Workflow Modules is used to manage and maintain customer records, including their contact details, classification, and financial information.

Steps to Use the Customer List

1. Access the Customer List Module

- Navigate to the **Requisition/Purchase Order** section in the left panel.
- Click on **Customer List** to open the customer database. (● Step 1 in the image)

2. Search and Filter Customer Records

- Use the **Search Bar** (top-right) to find specific customers by name, ID, or other details.

- Apply **Filters** to refine the list based on status, class, or location. (🔵 Step 2 in the image)

3. Edit or Update Customer Information

- Click the **pencil/edit icon** next to a customer's name to modify details. (🔵 Step 3 in the image)
- Update fields such as **Address, GL Account, or Contact Details**.
- Save changes to keep records updated.

4. Group and Sort Customers

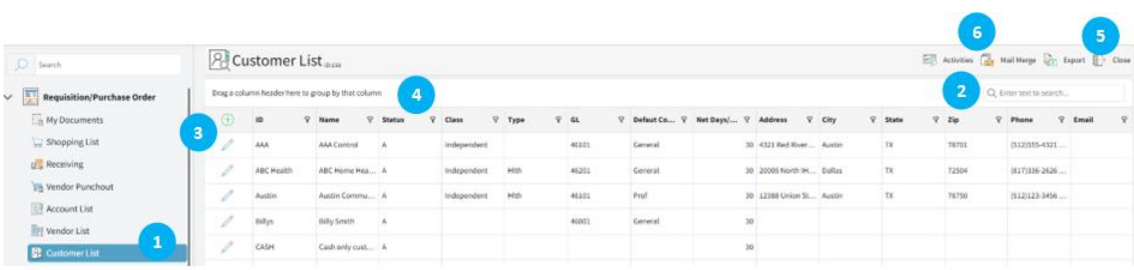
- Drag a column header to the top grouping area to organize customers by **Status, Class, or GL Account**. (🔵 Step 4 in the image)
- Click on column headers to sort customers in ascending or descending order.

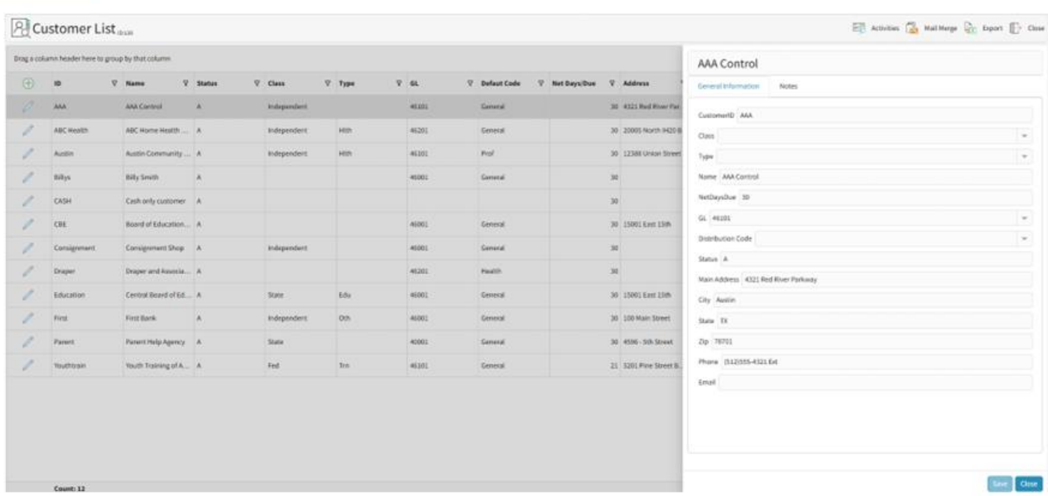
5. Export Customer Data

- Click on the **Export** button (top-right) to download customer records for reporting. (🔵 Step 5 in the image)

6. Perform Bulk Customer Activities

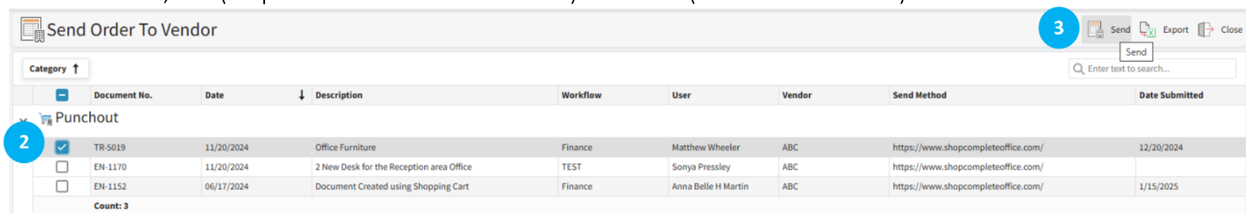
- Use the **Mail Merge** function to generate bulk communications for customers.
- Click **Activities** to track interactions or updates related to customers. (🔵 Step 6 in the image)





Send Order to Vendor

Please refer to your internal policies on whether this process is available or required)
Via PunchOut, fax (requires internet fax account) or email (must exist in MIP)

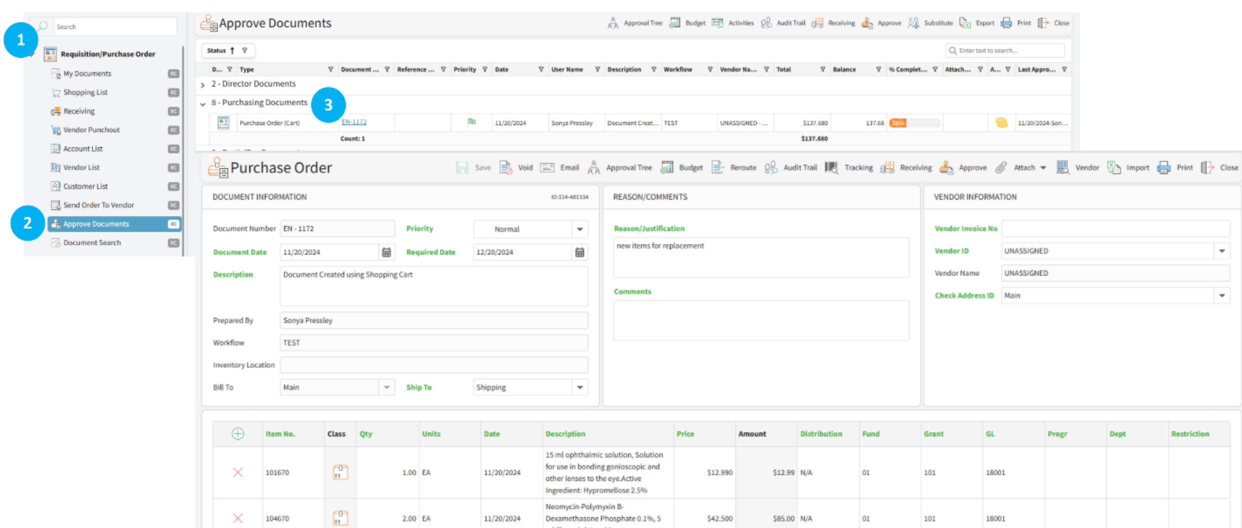


1. Navigate to main ribbon menu and select **Requisition/Purchase Order.**
2. Next, from the drop-down menu tab, select **Send Order to Vendor** and **check the box next to the order** to send (***Note:*** *If all menu items are disabled, contact your administrator to grant access to the items related to your role.)*
3. Click the **Send**  button to submit the order to the vendor for shipment.

Approver Options

After approvers receive email notifications to approve documents, they will view, edit, and approve documents.

1. Navigate to the main ribbon menu and select **Requisition/Purchase Order.**
2. From the drop-down menu tab, select **Approve Document**.
3. Now, select the row (s) containing the document you would like to approve by clicking the **link**.



4. Review the document to verify the price, quantity, description and most importantly, the account codes of how the items will be expensed. You can make changes directly on the form.

5. Click on the **Budget** button to view the budget details based on the organizations or funding source fiscal year if budgeting feature is turned on and budget is loaded

6. Use the **Void** button if you want to void the purchase request. A dialog box will open and ask for confirmation, click on **Yes** to confirm, or click on **No** to return to the document.

7. You can make changes directly or you can use the **re-route** button to return the document to the selected requester from the list for corrections.

8. Click on the **Audit Trail** button to list the progress of the document in the approval cycle and changes that were made to the document.

9. Choose EMAIL button if you would like more details about the purchase from the requester before approving.

10. If the document contains any attachments use the button to view or add additional attachments such as quotes, bids, spreadsheets etc. (Word, PDF, Excel etc.).

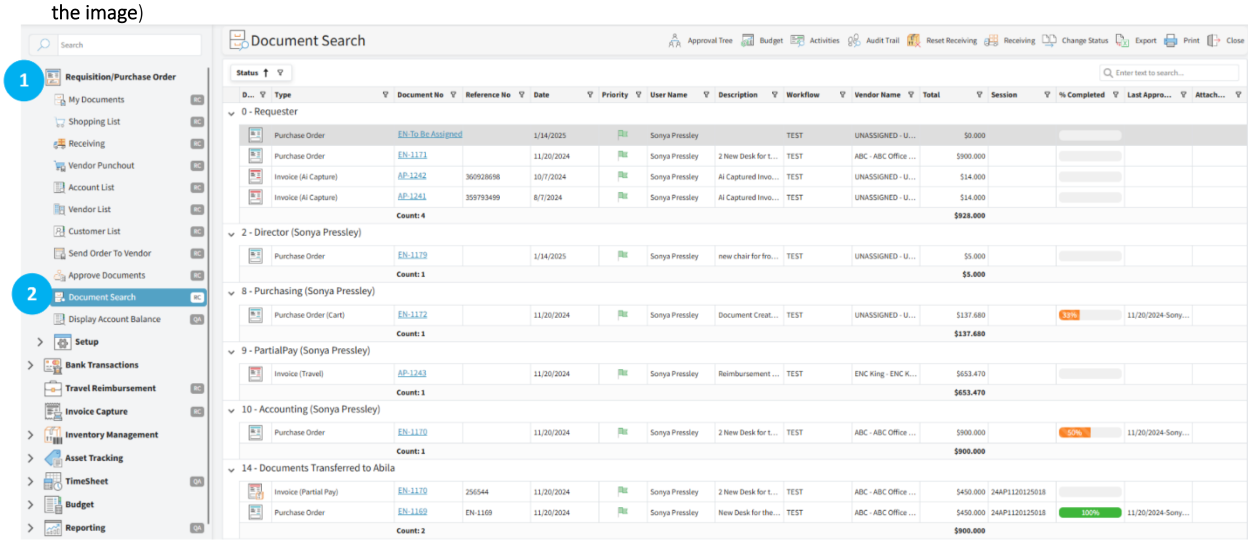
11. Now, click the **Approve** button to approve the document then, click on the **Close** button to return to home screen.

Buttons	**Description**
Void	Click to void document – A dialog box will open and ask for confirmation. Click "Yes" to confirm or click "No" to return to the document.
Reroute	Click to re-route the document to a selected user from a list.
Approve	Click this button to approve.
Audit Trail	List the progress and changes to the document in the approval cycle.
Email	Send email correspondence to the employee if you have questions about the document. Send an email from Microix to ask additional questions about this document.
Attach	**Attach** any electronic document to your document. Add documents as attachments such as quotes, bids, spreadsheets etc. (Word, PDF, Excel etc.).
Print	**Print** a copy of the document in the approval queue.
Close	**Close** to save current document or changes to the document and return to the home screen.

Document Search

This function is used by approvers to view the status of documents which they have approved or are scheduled to approve. To access this form:

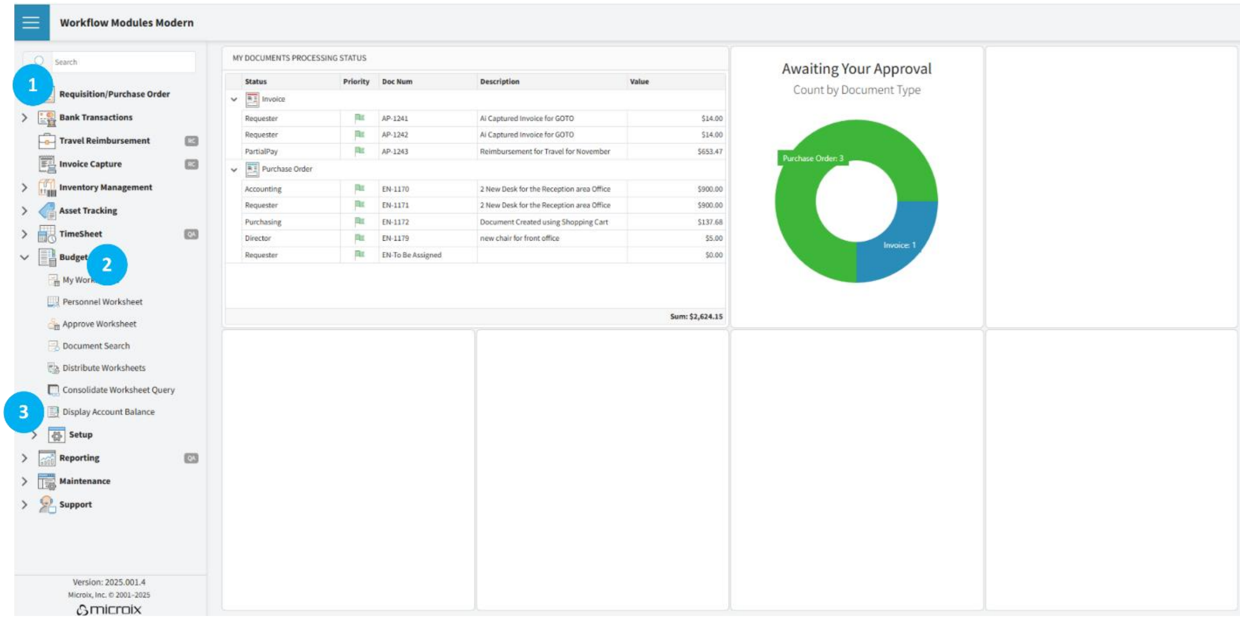
1. Navigate to main ribbon menu and select **Requisition/Purchase Order**. (● **Step 1** in the image)
2. Then select **Document Search** from the drop-down menu tab and follow the instructions. (● **Step 2** in the image)



Display Account Balance

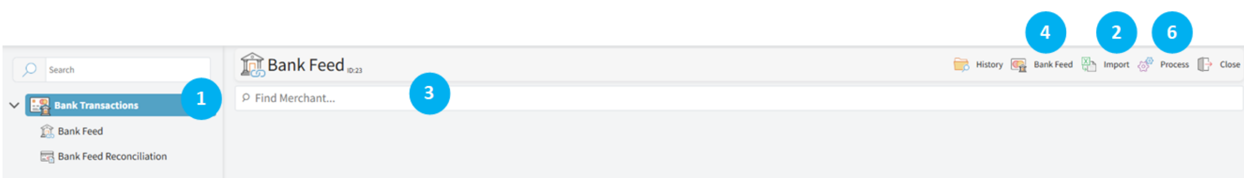
Managers can utilize this form to view the available funds for any of their assigned accounts.

1. Navigate to main ribbon menu and select **Requisition.**
2. Next, from the drop-down menu tab, select **Budget** > **Account Balance** ***Note:*** *If all the menu items are disabled, contact your administrator to grant access to the items related to your role.*
3. **Filter Information** section to select beginning date and end date and workflow data to view.



Bank Transactions

Steps to Use Bank Transactions in Workflow Modules Modern Version



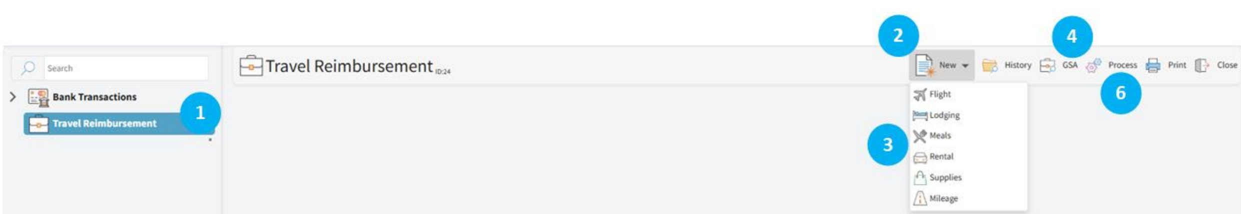
1. Access the Bank Transactions Module
    - Navigate to the **Setup** section in the left panel.
    - Click on **Bank Transactions**. (● **Step 1 in the image**)
2. **Import Transactions**
    - Click on the **Import** button at the top right. (● **Step 2 in the image**)
    - Upload your bank transactions file (typically in CSV or Excel format).
    - The system will process and display imported transactions.
3. **Review Transactions**
    - Use the **Find Merchant** search bar to locate specific transactions. (● **Step 3 in the image**)
    - Review the listed transactions to ensure all data is correct.
4. **Bank Feed Processing**

- Click on **Bank Feed** to pull in bank transactions from connected financial institutions. (● **Step 4 in the image**)
- Compare imported transactions with existing records.

5. **Transaction Matching & Reconciliation**
    - Use the **Bank Feed Reconciliation** option to match bank transactions with recorded entries in your system.
    - Ensure that all debits and credits align with your financial records.
6. **Processing Transactions**
    - Click **Process** to finalize matched transactions. (● **Step 6 in the image**)
    - Transactions will be marked as reconciled and recorded accordingly.
7. **Review History**
    - Click **History** to check previously processed transactions.
    - Use this for auditing and tracking past reconciliations.
8. **Closing & Finalizing**
    - Once transactions are matched and verified, click **Close** to exit the module.

Travel Reimbursement

The **Travel Reimbursement** module in Workflow Modules Modern allows users to submit and process reimbursement requests for travel-related expenses. Below are the steps to effectively use the module:



Steps to Use the Travel Reimbursement Form

1. Access the Travel Reimbursement Module

- Navigate to the left panel and select **Travel Reimbursement**. (● **Step 1 in the image**)
- The main screen will appear with available options.

2. Create a New Travel Reimbursement Request

- Click on the **New** button at the top right. (🔵 **Step 2 in the image**)
- Select the appropriate reimbursement form type.

3. Enter Reimbursement Details

- Fill in required fields, such as:
  - **Employee Name**
  - **Travel Purpose**
  - **Travel Dates**
  - **Destination**
- List expenses related to travel, including transportation, lodging, meals, and incidentals.

4. Use the GSA Rates Feature

- Click on **GSA** to pull in applicable per diem rates for meals and lodging. (🔵 **Step 4 in the image**)
- Ensure that rates align with official travel policies.

5. Attach Supporting Documents

- Upload receipts and any required documents for validation.

6. Process the Reimbursement Request

- Click **Process** to submit the request for approval. (🔵 **Step 6 in the image**)
- The system may route the request to an approver based on workflow rules.

7. Review History

- Click **History** to check past reimbursement requests and their status.

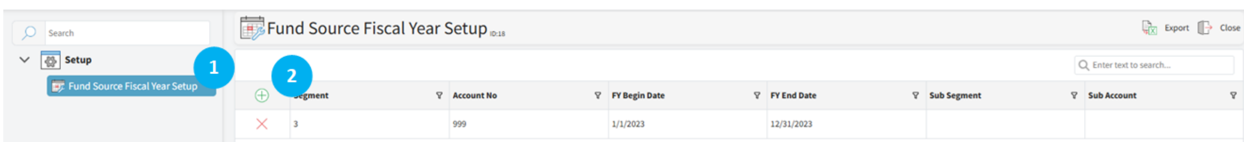
8. Print or Close

- Click **Print** to generate a report of the reimbursement request.
- Click **Close** to exit the module.

Setup

Fund Source Fiscal Year Setup

The **Fund Source Fiscal Year Setup** module is used to define the fiscal year periods for specific funding sources within your financial system. This module is crucial for organizations managing multiple funding sources, such as grants, internal budgets, and external donations. It ensures that transactions are recorded under the correct fiscal year and funding source.



How to Use the Fund Source Fiscal Year Setup

1. Access the Module

- Navigate to **Setup** in the left panel.
- Click **Fund Source Fiscal Year Setup** to open the fiscal year settings. (**Step 1 in the image**)

2. Add a New Fund Source Fiscal Year

- Click the **(+) Add button** to create a new entry. (**Step 2 in the image**)
- Enter the required details:
  - **Segment:** The fund source identifier (e.g., grants or internal funding code).
  - **Account No:** The account number associated with the fund.
  - **FY Begin Date:** Start date of fiscal year.
  - **FY End Date:** End date of fiscal year.
  - **Sub Segment & Sub Account (if applicable):** Additional classification for financial tracking.

3. Edit or Delete an Entry

- To modify an entry, click on the field and update the necessary values.
- To remove an entry, click the ❌ **(Delete) button** next to the segment.

4. Search and Filter Records

- Use the **search bar** at the top right to find specific fiscal years or fund sources.
- Utilize the **filter icons** in the column headers to narrow down records.

5. Export Data

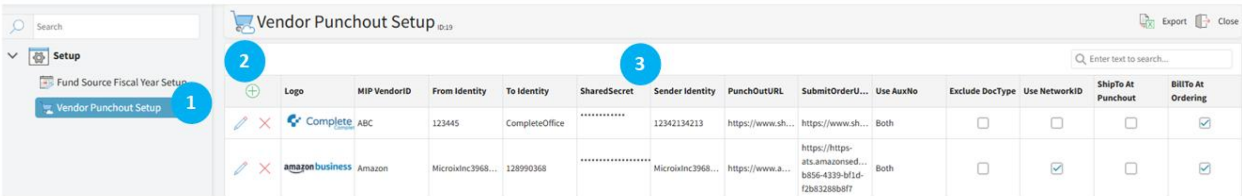
- Click **Export** (icon) in the top right to download the fiscal year setup in a spreadsheet format for reporting or backup purposes.

6. Close the Module

- Click **Close** when you have finished making updates.

Vendor Punchout Setup *(Return to Top)*

The **Vendor Punchout Setup** allows organizations to integrate with external vendor catalogs for streamlined procurement. Here's how you can set up and configure **Vendor Punchout**:

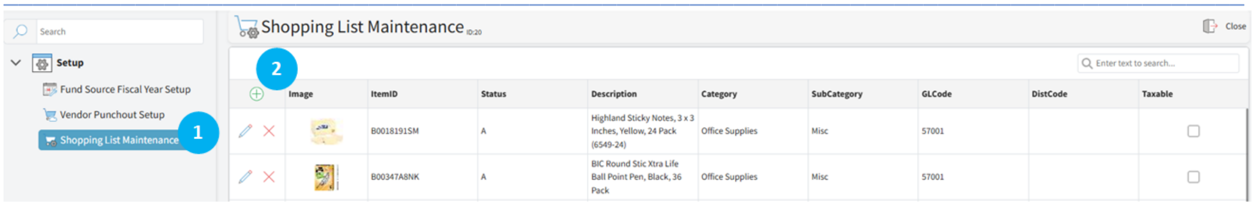


Steps to Configure Vendor Punchout Setup

1. **Access Vendor Punchout Setup**
   - Navigate to **Setup** in the left menu.
   - Click on **Vendor Punchout Setup**. (🔵 **Step 1 in the image**)
2. **Add a New Vendor Punchout**
   - Click on the **New** button. (🔵 **Step 2 in the image**)
   - Enter the vendor's name and details.
3. **Enter Vendor Punchout Credentials**
   - Input the required **cXML credentials** provided by the vendor. (🔵 **Step 3 in the image**)
   - Enter the **Punchout URL** where the system will connect.
   - Fill in authentication details such as **Identity, Shared Secret, and Supplier Domain**.
4. **Save and Activate**
   - Click **Save** to finalize the setup.
   - Activate the punchout option to allow users to access vendor catalogs.
   - Navigate to your procurement module and attempt a test punchout.
   - Ensure items transfer back correctly into your procurement workflow.

Shopping List Maintenance

The **Shopping List Maintenance** module helps manage frequently purchased items by categorizing and maintaining a list for procurement efficiency.



Steps to Configure Shopping List Maintenance

1. **Access Shopping List Maintenance**
   - Navigate to **Setup** in the left-side menu.
   - Click on **Shopping List Maintenance**. (● **Step 1 in the image**)
2. **Add New Items**
   - Click the **(+) Add** button to insert a new item. (● **Step 2 in the image**)
   - Enter the required details:
     - **Item ID** – Unique identifier for the item.
     - **Description** – Name and specifications of the product.
     - **Category & Subcategory** – Classify the item for better organization.
     - **GL Code** – Assign the correct General Ledger (GL) code.
     - **Distribution Code (DistCode)** – If applicable, enter the distribution code.
     - **Taxable Checkbox** – Select if the item is taxable.
3. **Edit or Remove Items**
   - Use the **Edit (Pencil Icon)** to modify an item's details.
   - Click the **Delete (X Icon)** to remove an item from the list.
4. **Search and Filter Items**
   - Use the **Search Bar** at the top to locate specific items quickly.
   - Apply **filters** to sort items by category, GL Code, or other attributes.
5. **Save and Close**
   - After adding or modifying items, ensure all details are correct.
   - Click **Save** to update the shopping list.
   - Click **Close** to exit the module.

Microix Additional Information and Resources *(Return to Top)*

Support Department

Customers can reach out to our **Support Department** using the following methods. Please note that support incidents have a **2–4-hour response time**, which may be longer if escalation to our development team is required.

For Support assistance:

Support Hours: Monday – Friday, 9:00 AM – 7:00 PM EST (Excluding Holidays)

Toll-Free: 866-MICROIX (642-7649), Ext. 1

Submit a support ticket (response by next business day): support@microix.net

Join a support session: https://microixhelp.cloudapp.net/customer

AI ChatBot-for software support is an AI-powered virtual assistant that helps users troubleshoot issues, answer FAQs, and provide guided support, improving response times and customer experience.

Search the Knowledge Base: https://www.microix.info/helpdesk

Resources -Instant Access to Microix Guides & Videos

To gain access, sign in using this link https://microix.net/resources

Sales, Accounting and Professional Services inquires

Office Hours: Monday – Friday, 9:00 AM – 5:00 PM EST (Excluding Holidays)

sales@microix.net

Need a System Review?

Overview- A system review is conducted per module to assist you with the following needs:

Assess remaining services| Evaluate training needs| Discuss best practices| Identify potential changes to the current setup

Goal-Maximize the benefits of the software by optimizing usage, enhancing efficiency, and implementing necessary improvements.

sales@microix.net Email to review your options