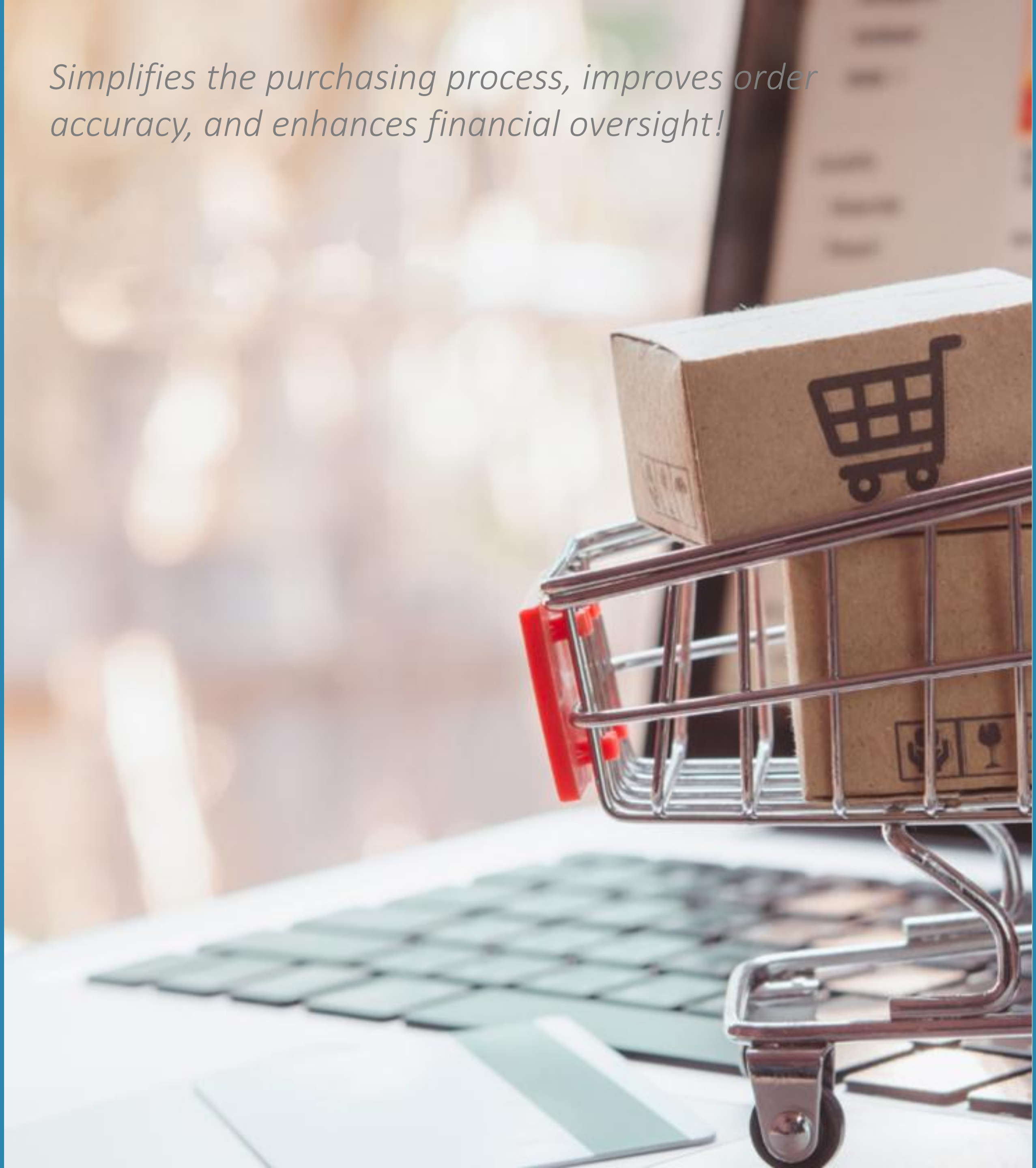



# Vendor Punchout

*This feature is available exclusively as an add-on for the Requisition | Purchase Order Module Modern.*

# Key Benefits

- Real-Time Order Tracking – The "In-Process Orders" section enables users to monitor order statuses, document numbers, dates, descriptions, and financial workflows.

- Improved Compliance and Control – The feature ensures that purchases follow predefined workflows (e.g., Finance, Services Workflow, etc.), helping organizations maintain budgetary control and compliance.
- Efficient Order Processing – The system allows for easy selection of vendors, shopping cart integration, and automated purchase order creation, reducing manual data entry.

- Centralized Procurement Management – Users can manage multiple vendors, approve documents, and track expenses all from a single interface, enhancing transparency and efficiency.

- Integration with Microix – Transactions linked to checking accounts can be transferred into Microix for approval and then posted as journal entries in MIP Fund Accounting.
- Seamless Vendor Integration – Users can directly access multiple CXML vendor catalogs (e.g., Amazon Business, Complete Office, Apex) from within the system, streamlining procurement.

# Vendor Punchout

*Workflow Process*

## 1. Employee selects the Vendor Button in Microix to access a vendor's website.

From the list of available cXML Vendors, they can start a new shopping cart, add items, and seamlessly return the cart to Microix for processing..

## 2. Processing

Employee will review the order (Document), add coding and back up before submitting for approval

## 2. Workflow Approval

The document is submitted for approval. The approver reviews the budget, makes corrections, or rejects it and provides a reason

## 3. Place Punchout order

(centralized of decentralized)

## 4. Accounting/Finance

The final approver reviews the document for accuracy and transfers it to the MIP Fund Accounting AP Module. (or as Cash Disbursement if required)

## 4. Post Batch

The document seamlessly transfers to MIP FA A/P Module ready to print check and send to vendor. (or as Cash Disbursement)

# Vendor Punchout

The Microix Punchout Catalog supports cXML Punchout capability for purchase orders (POs) only, as EDI is not supported.

If a vendor is not listed, customers must confirm **cXML Punchout compatibility** with their vendor before purchasing.

The vendor will provide the following required values for setup:

- ***From Identity/Sender Identity*** *(usually the same)*
- ***To Identity***
- ***Shared Secret***
- ***PunchoutURL*** *(for test and production, if different)*
- ***SubmitOrderURL*** *(for test and production, if different)*

This setup process ensures seamless integration with Microix for automated purchasing workflows.

amazon business
AmerisourceBergen
Apex Workplace Solutions
BencoDental
CDW
DELL
Discount School Supply
emapp An Afaxys Product
FERGUSON
FriendsOffice
GRAINGER
HENRY SCHEIN
KAPLAN Early Learning Company
Lakeshore
MEDLINE
MCKESSON
Office DEPOT
OfficeMax
PATTERSON COMPANIES, INC.
Quill.com
S&S Worldwide
STAPLES
School Specialty
Stinson's
Sysco
The Home Depot
ULINE
US FOODS
Veritiv
W.B. MASON
WAXIE Sanitary Supply

# Steps Involved 1-5

## Vendor Punchout

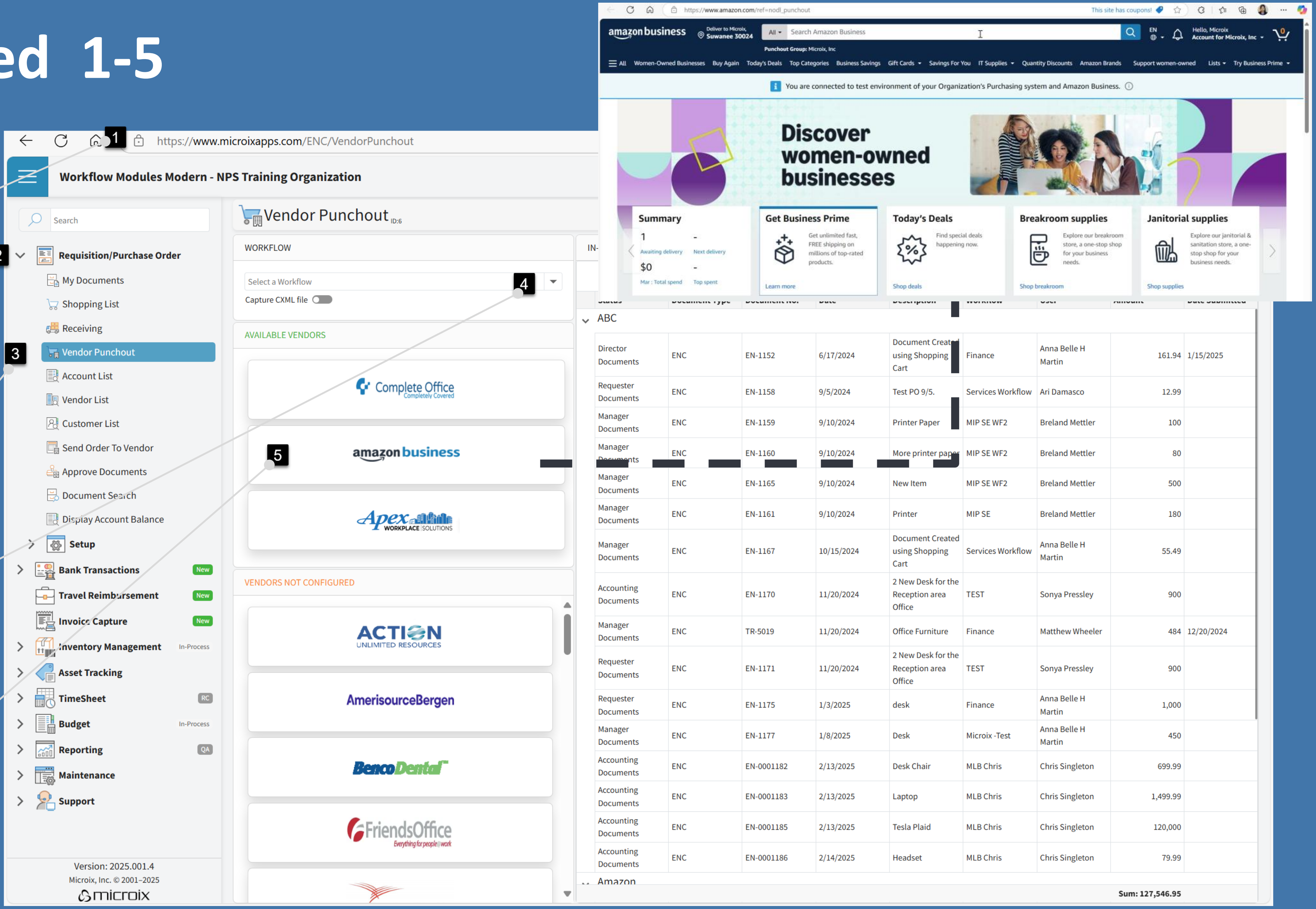
1. Log in to Workflow Modules Modern

2. Navigate Requisition Purchase Order Click on dropdown menu

3. Click on Vendor Punchout

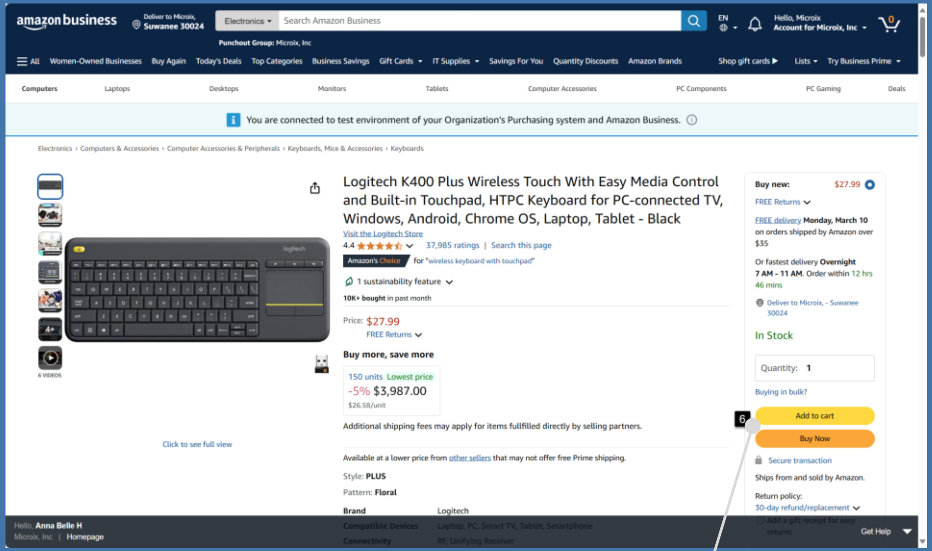
4. Select Workflow

5. Select Vendor from Available Vendors and it will take you to the vendor website
( This is a list that was previously setup for your organization to use )

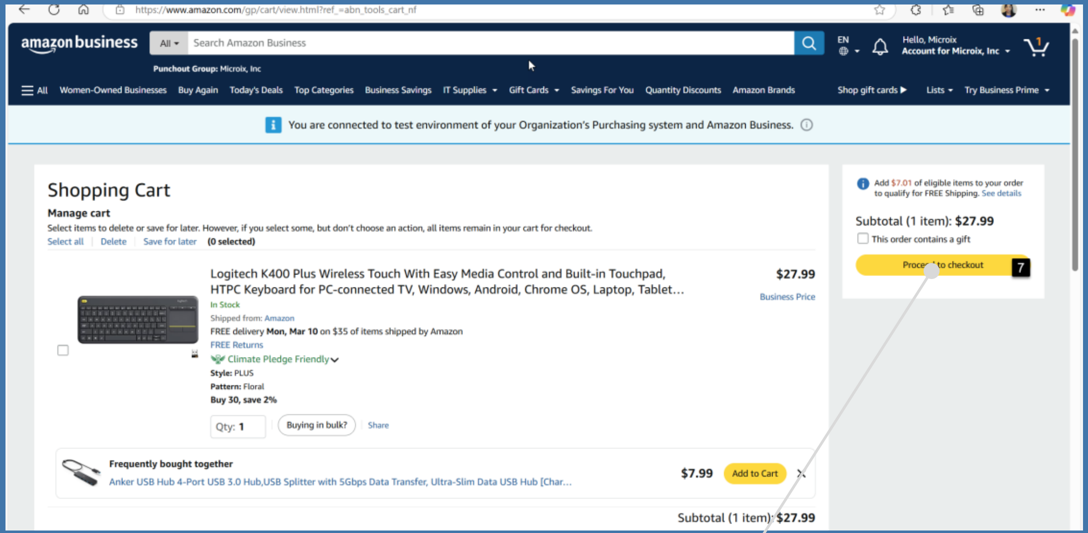


# Steps Involved 6-8

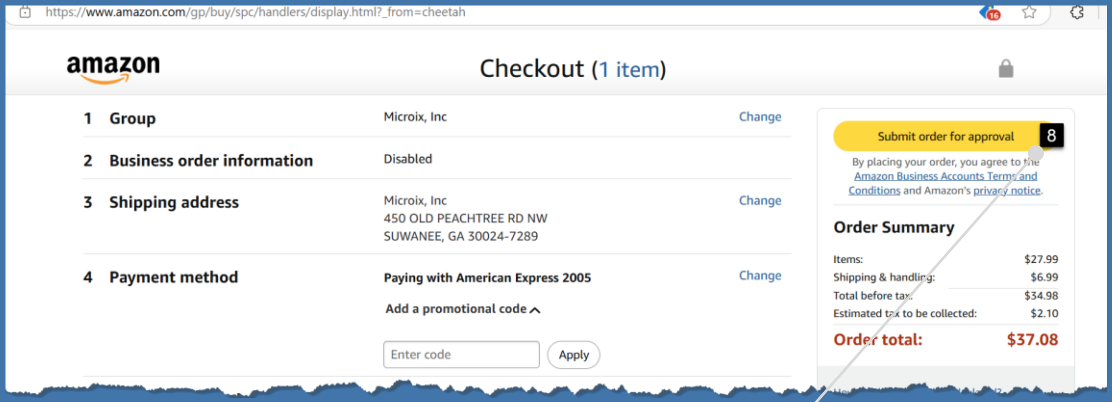
Vendor Punchout



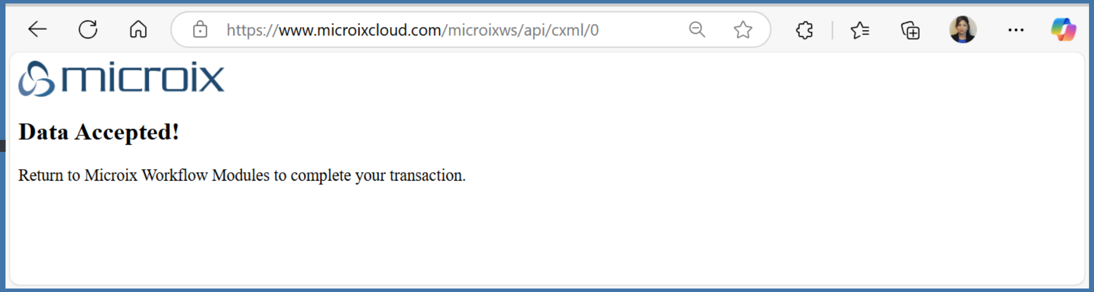

6. Shop and add item (s) to Cart




7. Click on Process to Check out.



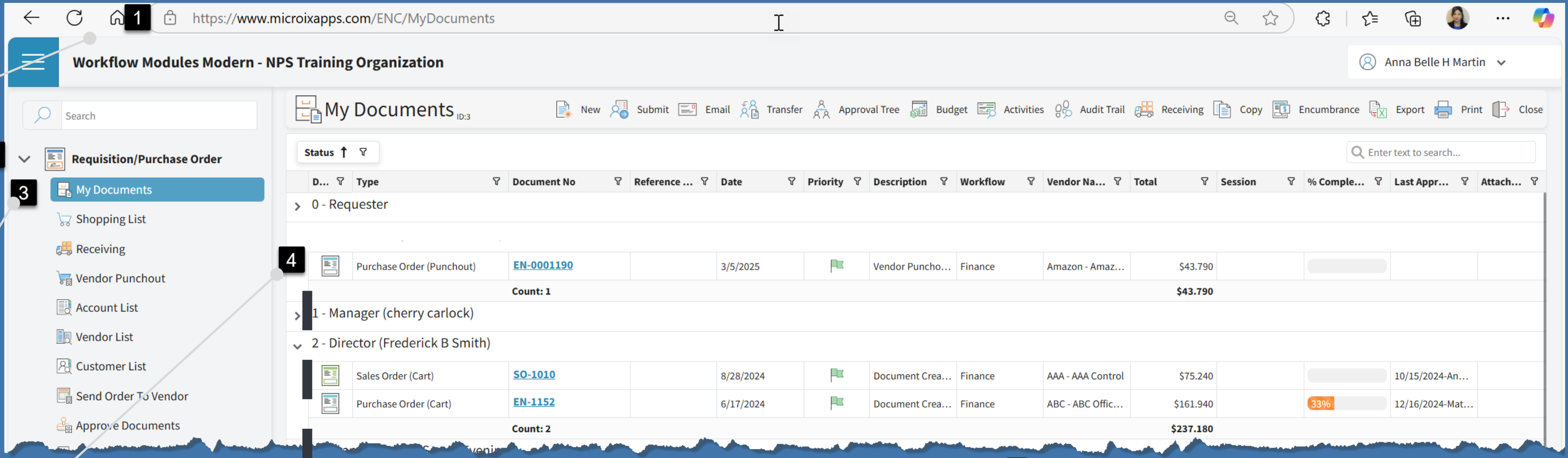

8. Submit order for Approval




Accepted Message and a note to return to Microix Workflow Modules to complete your transaction

# How find your document to finalize your transaction and submit it for approval.

Vendor Punchout



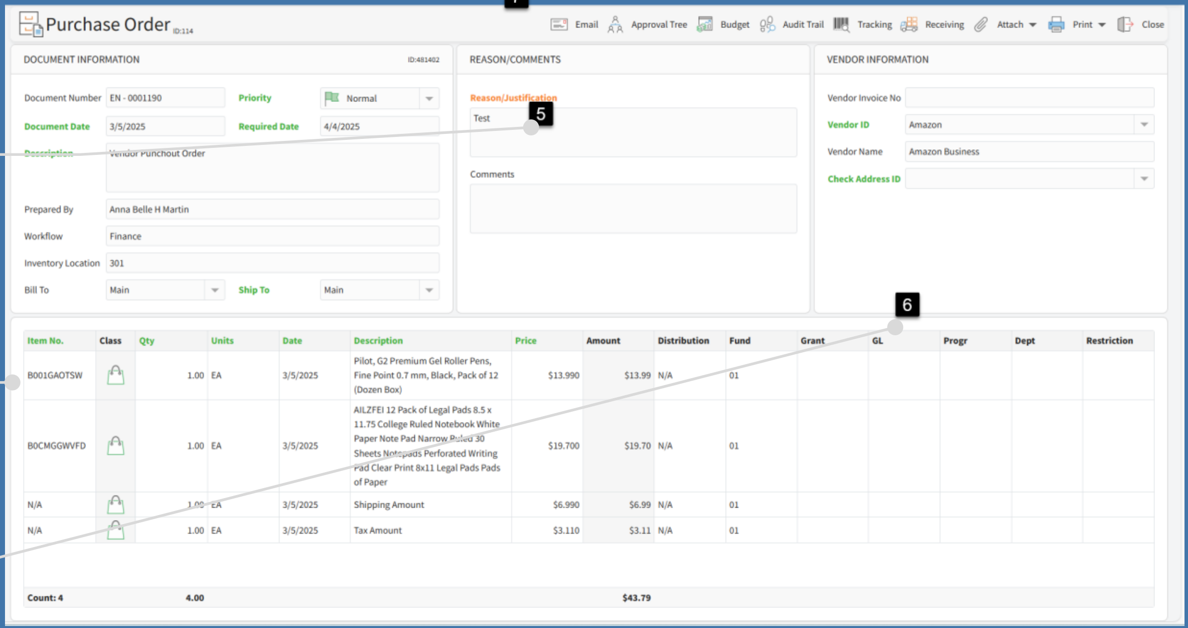

1. **Log in** to Workflow Modules Modern

2. Navigate to **Requisition /Purchase order** drop down list

3. Click on **My Document**

4. Locate the Document and double click to open

5. Must enter **Reason Justification** in this field

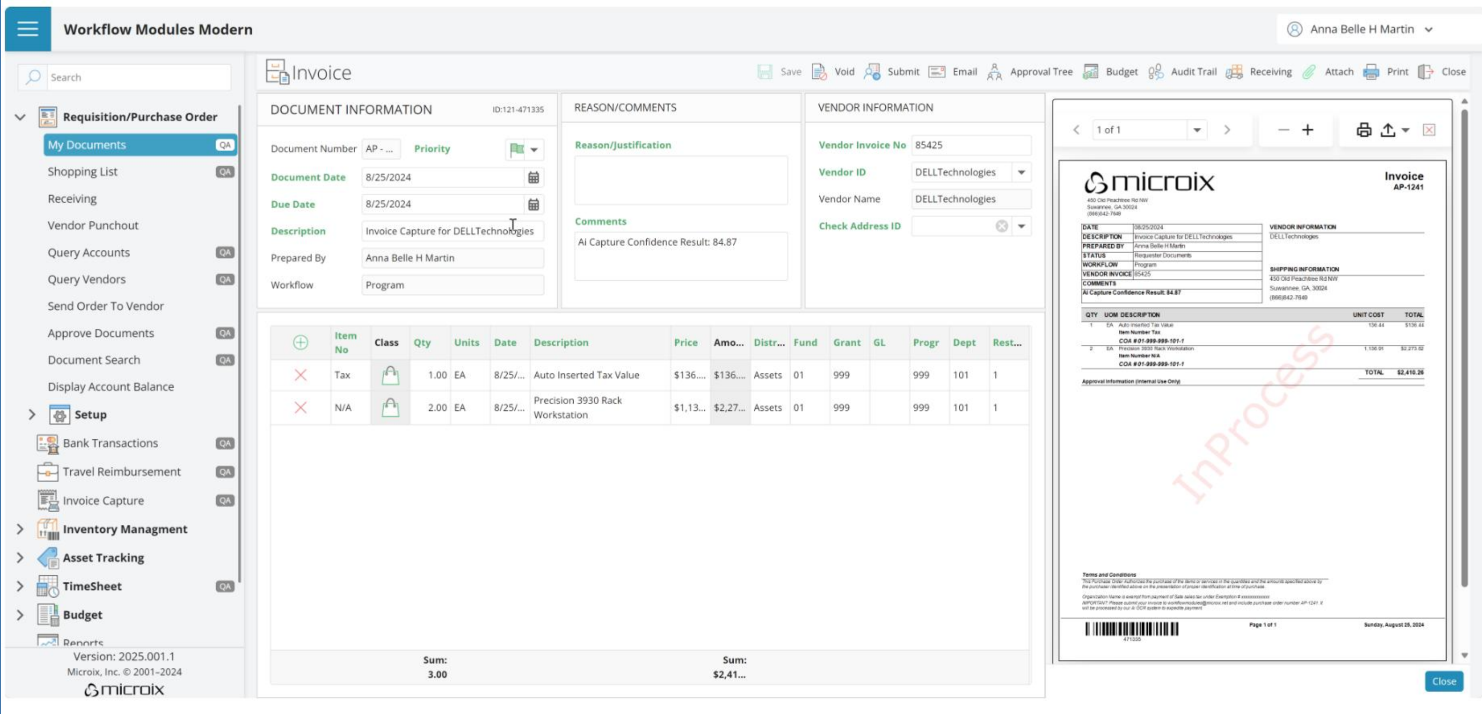


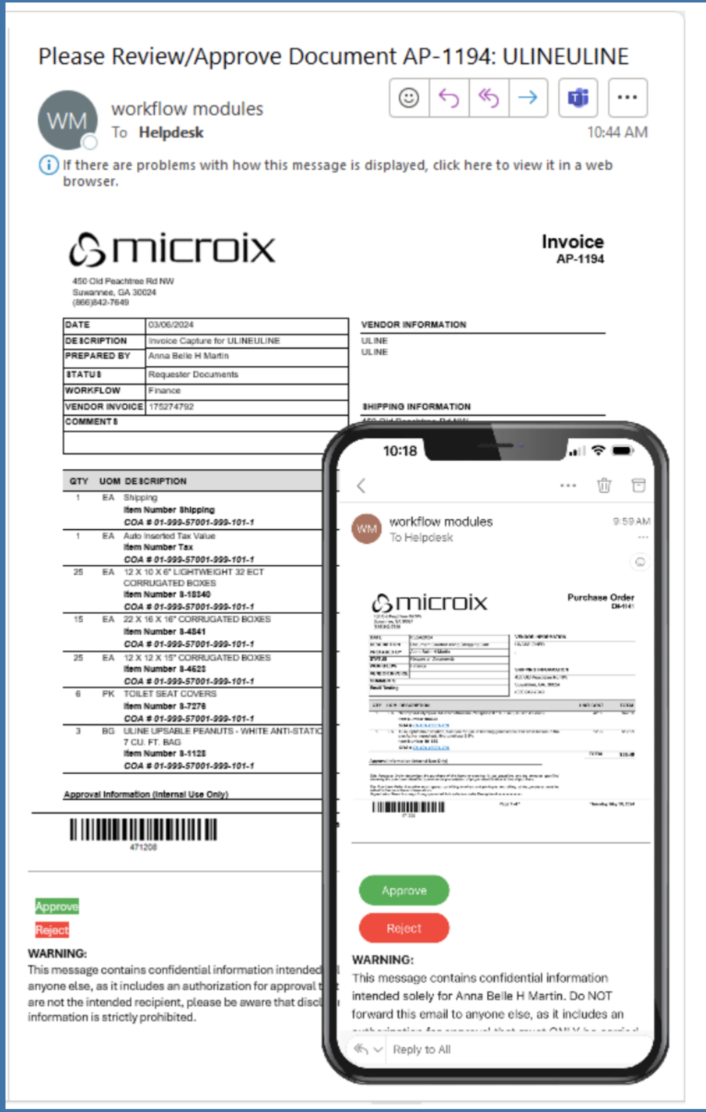

7. **Review** the entire document then **Submit** it for approval

6. **Enter coding** if distribution code was not used

# Overview of the Approval Process

*Email notifications are sent to an approver based on the workflow routing process. The email includes detailed information about the invoice, expense coding, budget, and previous approvers*




•Provide approvers the ability to modify the expense code or reject the invoice with a reason. The rejection note is communicated to the requester via email

•Review the invoice alongside a copy of the original PDF to ensure accuracy

•Implement a system to sort invoices based on their priority level

•Examine the document's audit trail to identify any alterations made prior to the invoice's receipt

Selected approvers can approve directly from a mobile device, tablet, or PC using our HTML approval

# How to place your order with your punchout vendor

Vendor Punchout

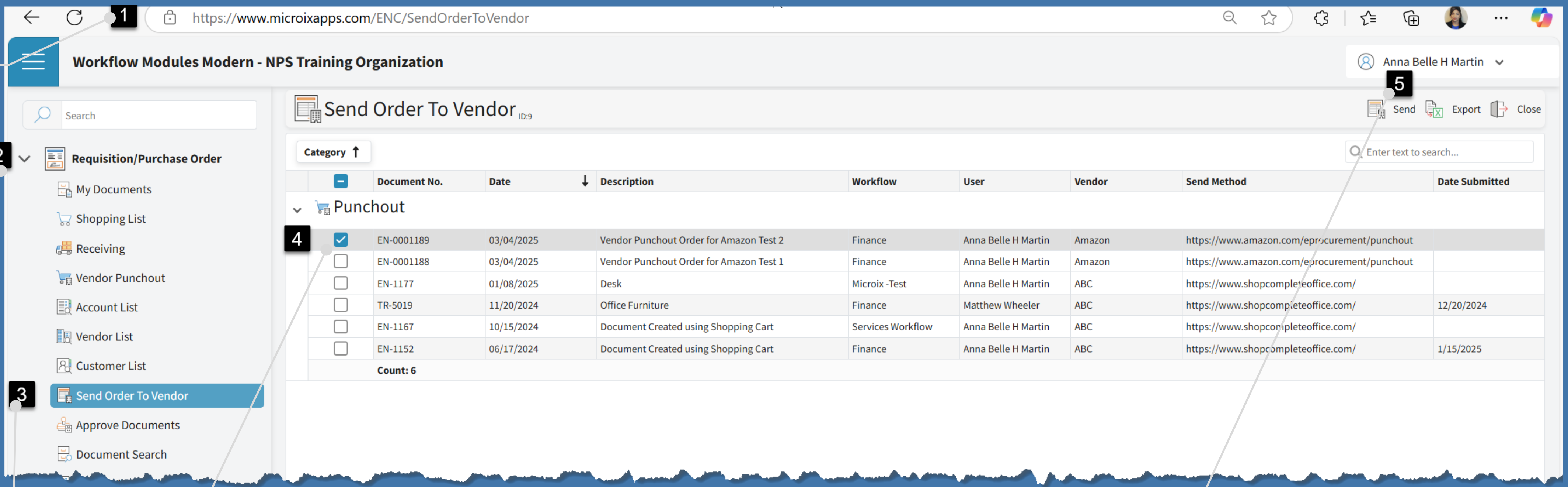
1. Log in to Workflow Modules Modern

2. Navigate Requisition Purchase Order Click on dropdown menu

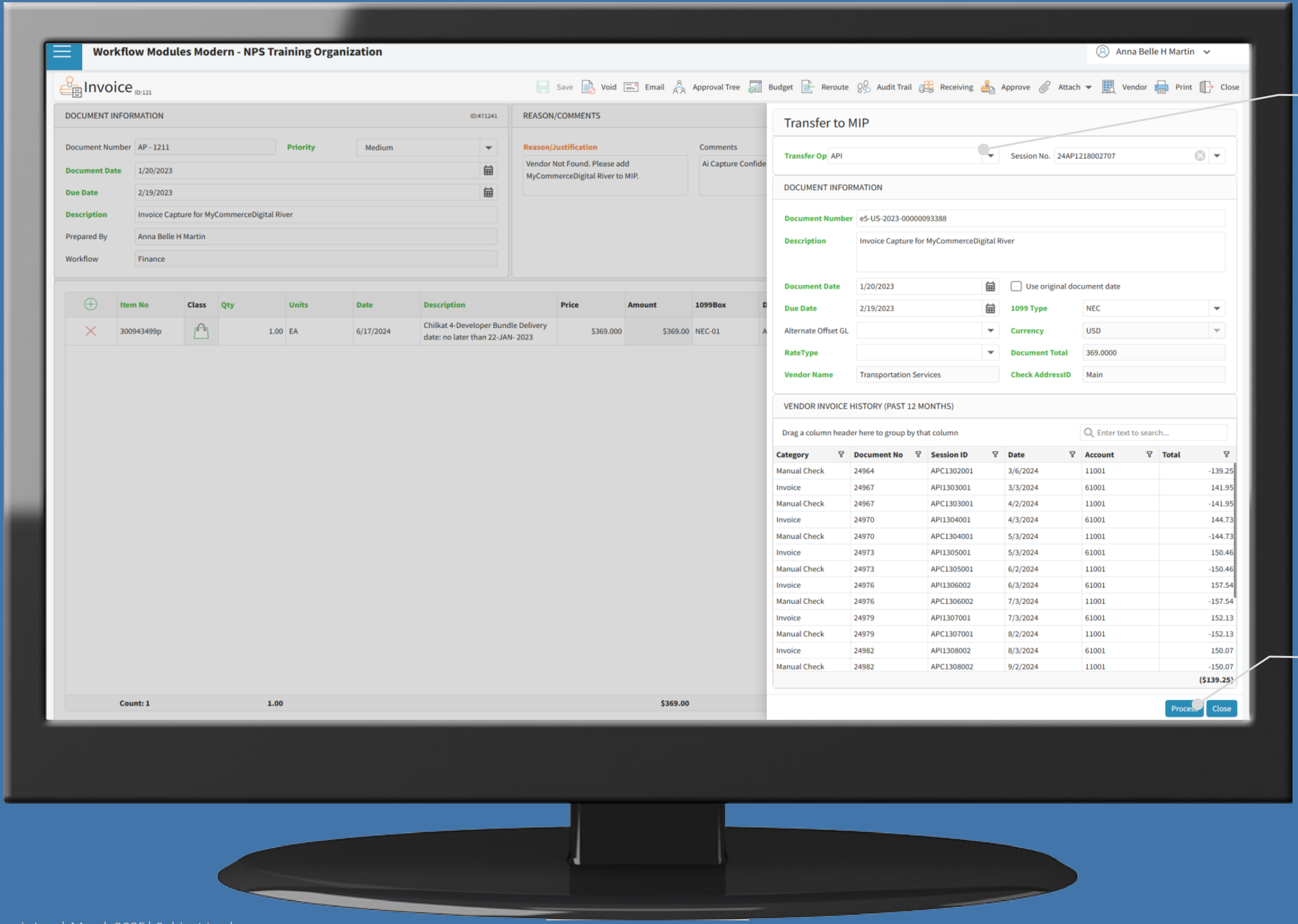
3. Click on Send Order to Vendor

4. Select Order | Document

5. Click on Send



# Example: Final Approval before transferring to MIP Fund Accounting®




Transfer Options

| Code | Description |
|---|---|
| API | Accounts Payable |
| CD | Cash Disbursement |
| JV | Journal Entry |

Click on **Process.**

*Note: The final step is to log in to MIP FA. The AP session is ready to be posted in MIP Fund Accounting.*


## 📩 Get in Touch

For a live demo, quote request, or any inquiries, reach out to us at **sales@microix.net**. Our team is ready to connect you with your MIP/Microix reseller.

## 🔹 Exclusive Feature

This feature is available exclusively as an add-on for the Requisition | Purchase Order Module Modern.

## 🌐 Explore More

Visit us at [www.microix.net](www.microix.net)

**📧 Email:** sales@microix.net

**📞 Call:** 1-866-MICROIX (642-7649)