

Simplifies the purchasing process, improves order accuracy, and enhances financial oversight!

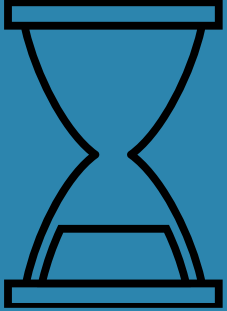
Workflow Modules Modern for MIP Fund Accounting®

Vendor Punchout

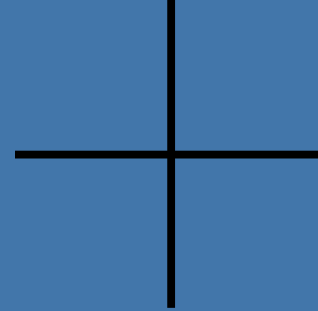
This feature is available exclusively as an add-on for the Requisition | Purchase Order Module Modern.

Key Benefits

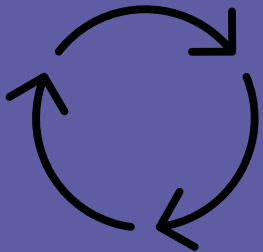
Workflow Modules Modern for MIP Fund Accounting®



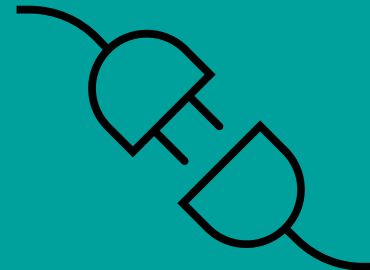
- Real-Time Order Tracking – The "In-Process Orders" section enables users to monitor order statuses, document numbers, dates, descriptions, and financial workflows.



- 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.

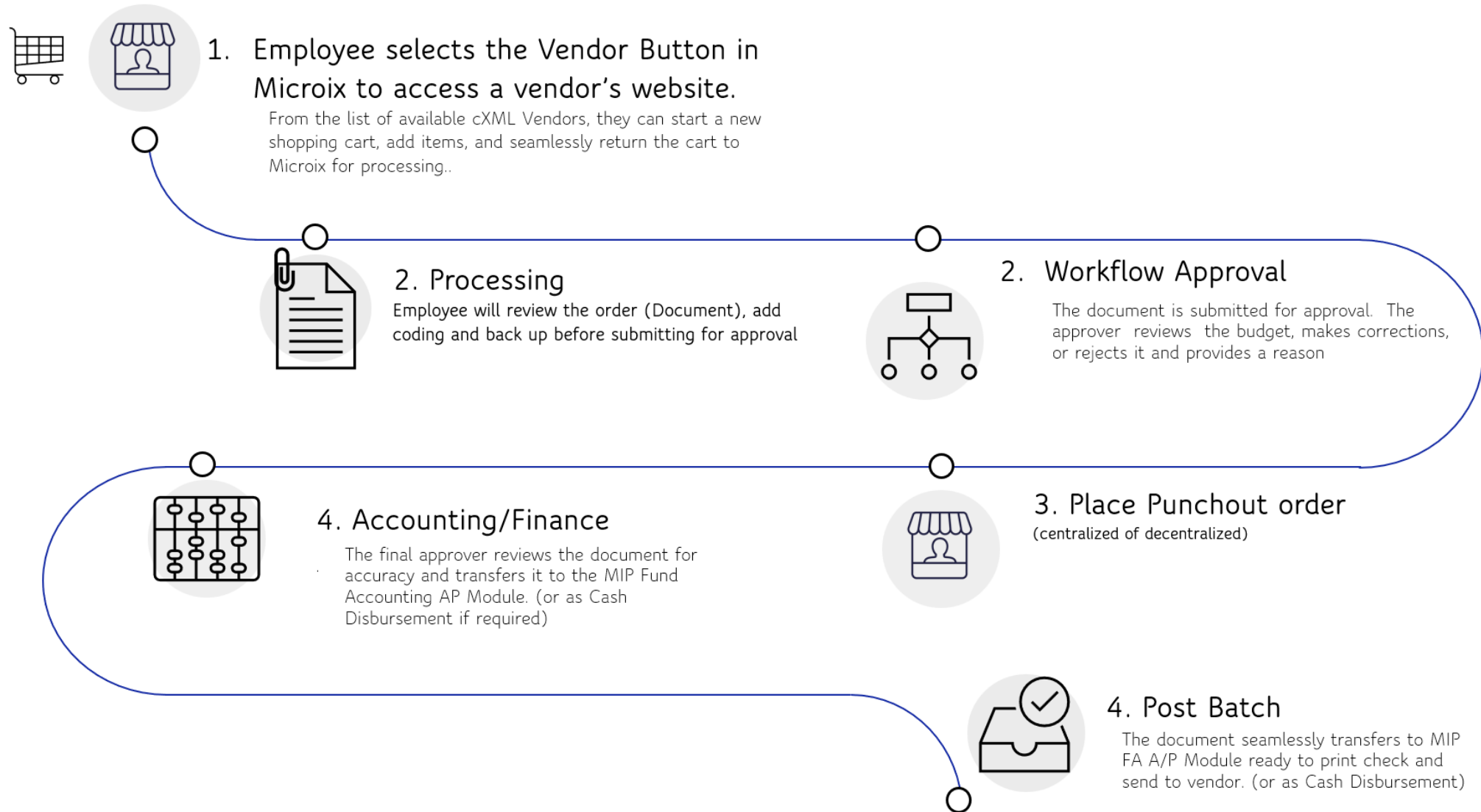


- Integration with Microix – Transactions linked to checking accounts can be transferred into Microix for approval and then posted as journal entries in MIP Fund Accounting.
- Seamless Vendor Integration – Users can directly access multiple CXML vendor catalogs (e.g., Amazon Business, Complete Office,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

Vendor Punchout

Workflow Process

Workflow Modules Modern for MIP Fund Accounting®



Vendor Punchout

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

Workflow Modules Modern for MIP Fund Accounting®

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
Everything for people who work

GRAINGER
FOR THE ONES WHO GET IT DONE

HENRY SCHEIN

KAPLAN
EARLY LEARNING COMPANY

Lakeshore

MEDLINE

McKESSON

Office DEPOT
Taking Care of Business

OfficeMax

PATTERSON
COMPANIES, INC.

Quill.com

S&S
Worldwide

STAPLES

School
Specialty

Stinson's

Sysco

THE
HOME
DEPOT

ULINE

US
FOODS

Veritiv

WHO BUT
W.B. MASON
FOR OFFICE SUPPLIES, FURNITURE & PRINTING

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)

Workflow Modules Modern - NPS Training Organization

Search

Vendor Punchout ID:6

WORKFLOW

Select a Workflow

Capture CXML file

AVAILABLE VENDORS

Complete Office

amazon business

Apex

VENDORS NOT CONFIGURED

ACTION

AmerisourceBergen

Benco Dental

FriendsOffice

Version: 2025.001.4
Microix, Inc. © 2001-2025

amazon business

Discover women-owned businesses

Summary

Get Business Prime

Today's Deals

Breakroom supplies

Janitorial supplies

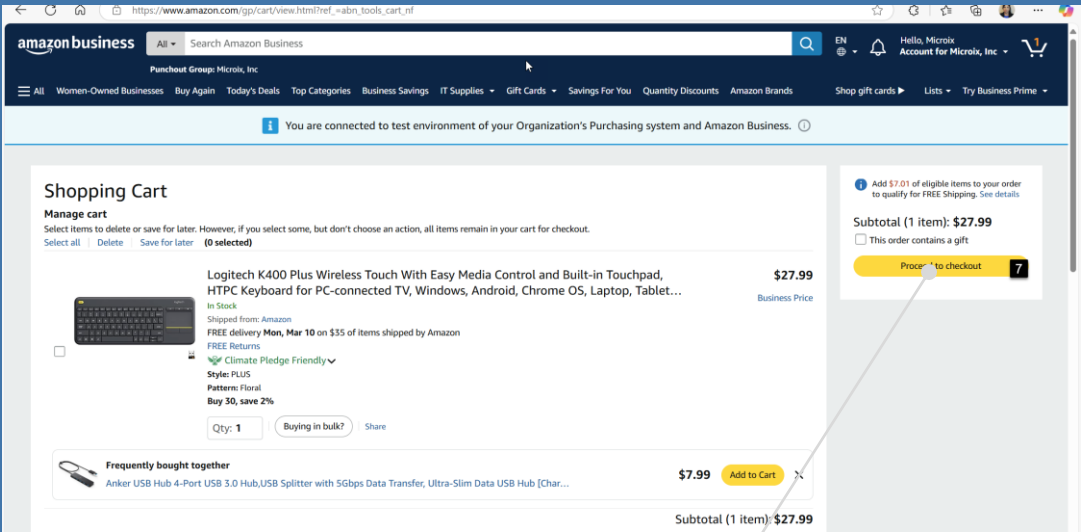
Director Documents	ENC	EN-1152	6/17/2024	Document Created using Shopping Cart	Finance	Anna Belle H Martin	161.94	1/15/2025
Requester Documents	ENC	EN-1158	9/5/2024	Test PO 9/5.	Services Workflow	Ari Damasco	12.99	
Manager Documents	ENC	EN-1159	9/10/2024	Printer Paper	MIP SE WF2	Breland Mettler	100	
Manager Documents	ENC	EN-1160	9/10/2024	More printer paper	MIP SE WF2	Breland Mettler	80	
Manager Documents	ENC	EN-1165	9/10/2024	New Item	MIP SE WF2	Breland Mettler	500	
Manager Documents	ENC	EN-1161	9/10/2024	Printer	MIP SE	Breland Mettler	180	
Manager Documents	ENC	EN-1167	10/15/2024	Document Created using Shopping Cart	Services Workflow	Anna Belle H Martin	55.49	
Accounting Documents	ENC	EN-1170	11/20/2024	2 New Desk for the Reception area Office	TEST	Sonya Pressley	900	
Manager Documents	ENC	TR-5019	11/20/2024	Office Furniture	Finance	Matthew Wheeler	484	12/20/2024
Requester Documents	ENC	EN-1171	11/20/2024	2 New Desk for the Reception area Office	TEST	Sonya Pressley	900	
Requester Documents	ENC	EN-1175	1/3/2025	desk	Finance	Anna Belle H Martin	1,000	
Manager Documents	ENC	EN-1177	1/8/2025	Desk	Microix -Test	Anna Belle H Martin	450	
Accounting Documents	ENC	EN-0001182	2/13/2025	Desk Chair	MLB Chris	Chris Singleton	699.99	
Accounting Documents	ENC	EN-0001183	2/13/2025	Laptop	MLB Chris	Chris Singleton	1,499.99	
Accounting Documents	ENC	EN-0001185	2/13/2025	Tesla Plaid	MLB Chris	Chris Singleton	120,000	
Accounting Documents	ENC	EN-0001186	2/14/2025	Headset	MLB Chris	Chris Singleton	79.99	
Amazon								
							Sum:	127,546.95

Steps Involved 6-8

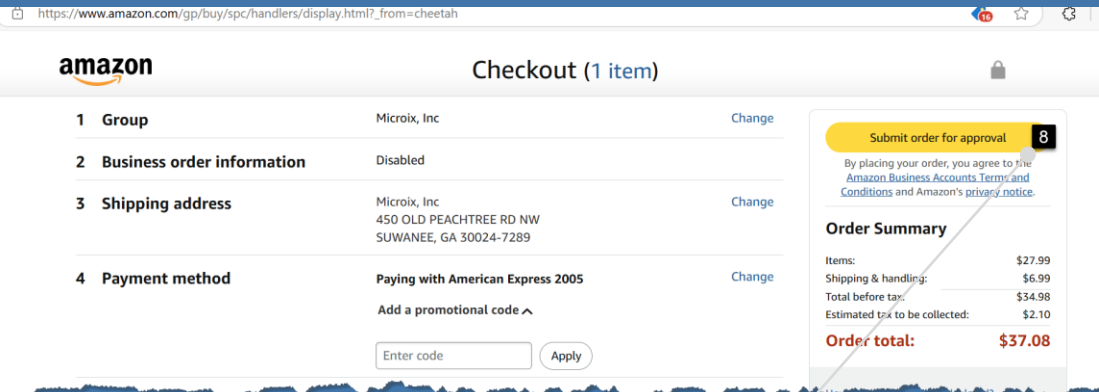
Vendor Punchout



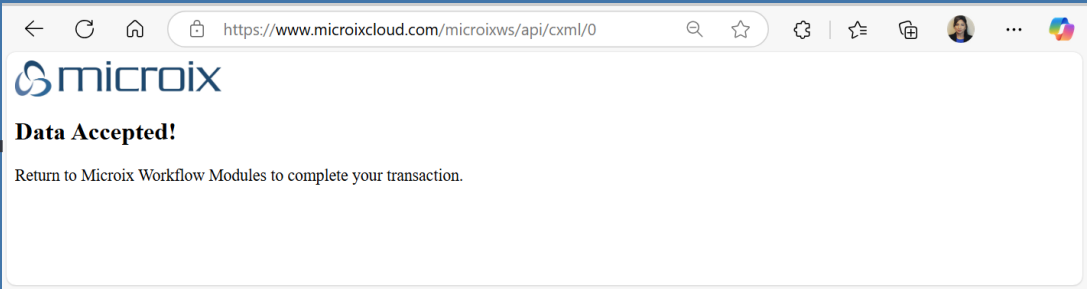
6. Shop and add item (s) to Cart



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

7. Review the entire document then Submit it for approval

6. Enter coding if distribution code was not used

Workflow Modules Modern - NPS Training Organization

Search

Requisition/Purchase Order

My Documents

Shopping List

Receiving

Vendor Punchout

Account List

Vendor List

Customer List

Send Order To Vendor

Approve Documents

My Documents ID:3

Status ↑ ▾

D...	Type	Document No	Reference ...	Date	Priority	Description	Workflow	Vendor Na...	Total	Session	% Comple...	Last Appr...	Attach...
> 0 - Requester													
	Purchase Order (Punchout)	EN-0001190		3/5/2025		Vendor Puncho...	Finance	Amazon - Amaz...	\$43.790				
Count: 1									\$43.790				
> 1 - Manager (cherry carlock)													
2 - Director (Frederick B Smith)													
	Sales Order (Cart)	SO-1010		8/28/2024		Document Crea...	Finance	AAA - AAA Control	\$75.240			10/15/2024-An...	
	Purchase Order (Cart)	EN-1152		6/17/2024		Document Crea...	Finance	ABC - ABC Offic...	\$161.940		33%	12/16/2024-Mat...	
Count: 2									\$237.180				

Purchase Order ID:114

DOCUMENT INFORMATION

Document Number EN - 0001190 Priority Normal

Document Date 3/5/2025 Required Date 4/4/2025

Description Vendor Punchout Order

Prepared By Anna Belle H Martin

Workflow Finance

Inventory Location 301

Bill To Main Ship To Main

REASON/COMMENTS

Reason/Justification Test

Comments

VENDOR INFORMATION

Vendor Invoice No

Vendor ID Amazon

Vendor Name Amazon Business

Check Address ID

Item No. Class Qty Units Date Description Price Amount Distribution Fund Grant GL Progr Dept Restriction

B001GAOTSW		1.00	EA	3/5/2025	Pilot, G2 Premium Gel Roller Pens, Fine Point 0.7 mm, Black, Pack of 12 (Dozen Box)	\$13.990	\$13.99	N/A	01				
B0CMGWWFD		1.00	EA	3/5/2025	ALL2FEI 12 Pack of Legal Pads 8.5 x 11.75 College Ruled Notebook White Paper Note Pad Narrow Ruled 30 Sheets Notepad Perforated Writing Pad Clear Print 8x11 Legal Pads Pads of Paper	\$19.700	\$19.70	N/A	01				
N/A		1.00	EA	3/5/2025	Shipping Amount	\$6.990	\$6.99	N/A	01				
N/A		1.00	EA	3/5/2025	Tax Amount	\$3.110	\$3.11	N/A	01				

Count: 4 4.00 \$43.79

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

Workflow Modules Modern

Search

Requisition/Purchase Order

My Documents

Shopping List

Receiving

Vendor Punchout

Query Accounts

Query Vendors

Send Order To Vendor

Approve Documents

Document Search

Display Account Balance

Setup

Bank Transactions

Travel Reimbursement

Invoice Capture

Inventory Management

Asset Tracking

TimeSheet

Budget

Version: 2025.001.1

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Invoice

DOCUMENT INFORMATION

Document Number

AP - ...

Priority

Document Date

8/25/2024

Due Date

8/25/2024

Description

Invoice Capture for DELLTechnologies

Prepared By

Anna Belle H Martin

Workflow

Program

REASON/COMMENTS

Reason/Justification

Comments

AI Capture Confidence Result: 84.87

VENDOR INFORMATION

Vendor Invoice No

85425

Vendor ID

DELLTechnologies

Vendor Name

DELLTechnologies

Check Address ID

Item No

Class

Qty

Units

Date

Description

Price

Amo...

Distr...

Fund

Grant

GL

Progr

Dept

Rest...

Sum:

3.00

Sum:

\$2.41...

1 of 1

microix

Invoice

AP-1241

DATE

8/25/2024

DESCRIPTION

Invoice Capture for DELLTechnologies

PREPARED BY

Anna Belle H Martin

STATUS

Requester Documents

WORKFLOW

Program

VENDOR INVOICE

175274792

COMMENTS

AI Capture Confidence Result: 84.87

QTY

UOM

DESCRIPTION

UNIT COST

TOTAL

1

EA

Shipping

106.84

\$106.84

1

EA

Auto Inserted Tax Value

1.00

\$1.00

25

EA

12 X 10 X 10" LIGHTWEIGHT 32 ECT CORRUGATED BOXES

1.00

\$2,275.00

15

EA

22 X 16 X 16" CORRUGATED BOXES

1.00

\$1,100.00

25

EA

12 X 12 X 12" CORRUGATED BOXES

1.00

\$2,275.00

6

PK

TOILET SEAT COVERS

1.00

\$1,100.00

3

BD

ULINE UPSHABLE PEANUTS - WHITE ANTI-STATIC

1.00

\$1,100.00

7

CU

FT. BAG

1.00

\$1,100.00

Item Number

8-4841

COA #

01-999-57001-999-101-1

Item Number

8-10140

COA #

01-999-57001-999-101-1

Item Number

8-4525

COA #

01-999-57001-999-101-1

Item Number

8-1128

COA #

01-999-57001-999-101-1

Barcode

471208

Page 1 of 1

Monday, August 19, 2024

- 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

Please Review/Approve Document AP-1194: ULINEULINE

WM workflow modules To Helpdesk

10:44 AM

If there are problems with how this message is displayed, click here to view it in a web browser.

microix

Invoice AP-1194

400 Old Peachtree Rd NW
Savannah, GA 30024
(866)842-7640

DATE

03/06/2024

DESCRIPTION

Invoice Capture for ULINEULINE

PREPARED BY

Anna Belle H Martin

STATUS

Requester Documents

WORKFLOW

Finance

VENDOR INVOICE

175274792

COMMENTS

VENDOR INFORMATION

ULINE

ULINE

SHIPPING INFORMATION

400 Old Peachtree Rd NW
Savannah, GA 30024
(866)842-7640

QTY

UOM

DESCRIPTION

1

EA

Shipping

Item Number

Shipping

COA #

01-999-57001-999-101-1

1

EA

Auto Inserted Tax Value

Item Number

Tax

COA #

01-999-57001-999-101-1

25

EA

12 X 10 X 10" LIGHTWEIGHT 32 ECT CORRUGATED BOXES

Item Number

8-10140

COA #

01-999-57001-999-101-1

15

EA

22 X 16 X 16" CORRUGATED BOXES

Item Number

8-4841

COA #

01-999-57001-999-101-1

25

EA

12 X 12 X 12" CORRUGATED BOXES

Item Number

8-4525

COA #

01-999-57001-999-101-1

6

PK

TOILET SEAT COVERS

Item Number

8-7278

COA #

01-999-57001-999-101-1

3

BD

ULINE UPSHABLE PEANUTS - WHITE ANTI-STATIC

Item Number

8-1128

COA #

01-999-57001-999-101-1

Barcode

471208

Page 1 of 1

Monday, August 19, 2024

Approve

Reject

WARNING:

This message contains confidential information intended solely for Anna Belle H Martin. Do NOT forward this email to anyone else, as it includes an authorization for approval that must remain confidential.

Reply to All

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

Workflow Modules Modern - NPS Training Organization

Search

Requisition/Purchase Order

My Documents

Shopping List

Receiving

Vendor Punchout

Account List

Vendor List

Customer List

Send Order To Vendor

Approve Documents

Document Search

Send Order To Vendor

Category

	Document No.	Date	Description	Workflow	User	Vendor	Send Method	Date Submitted
▼	Punchout							
4	☒	EN-0001189	03/04/2025	Vendor Punchout Order for Amazon Test 2	Finance	Anna Belle H Martin	Amazon	https://www.amazon.com/epr/securement/punchout
	☐	EN-0001188	03/04/2025	Vendor Punchout Order for Amazon Test 1	Finance	Anna Belle H Martin	Amazon	https://www.amazon.com/epr/securement/punchout
	☐	EN-1177	01/08/2025	Desk	Microix -Test	Anna Belle H Martin	ABC	https://www.shopcompleteoffice.com/
	☐	TR-5019	11/20/2024	Office Furniture	Finance	Matthew Wheeler	ABC	https://www.shopcompleteoffice.com/ 12/20/2024
	☐	EN-1167	10/15/2024	Document Created using Shopping Cart	Services Workflow	Anna Belle H Martin	ABC	https://www.shopcompleteoffice.com/
	☐	EN-1152	06/17/2024	Document Created using Shopping Cart	Finance	Anna Belle H Martin	ABC	https://www.shopcompleteoffice.com/ 1/15/2025
	Count: 6							

Anna Belle H Martin

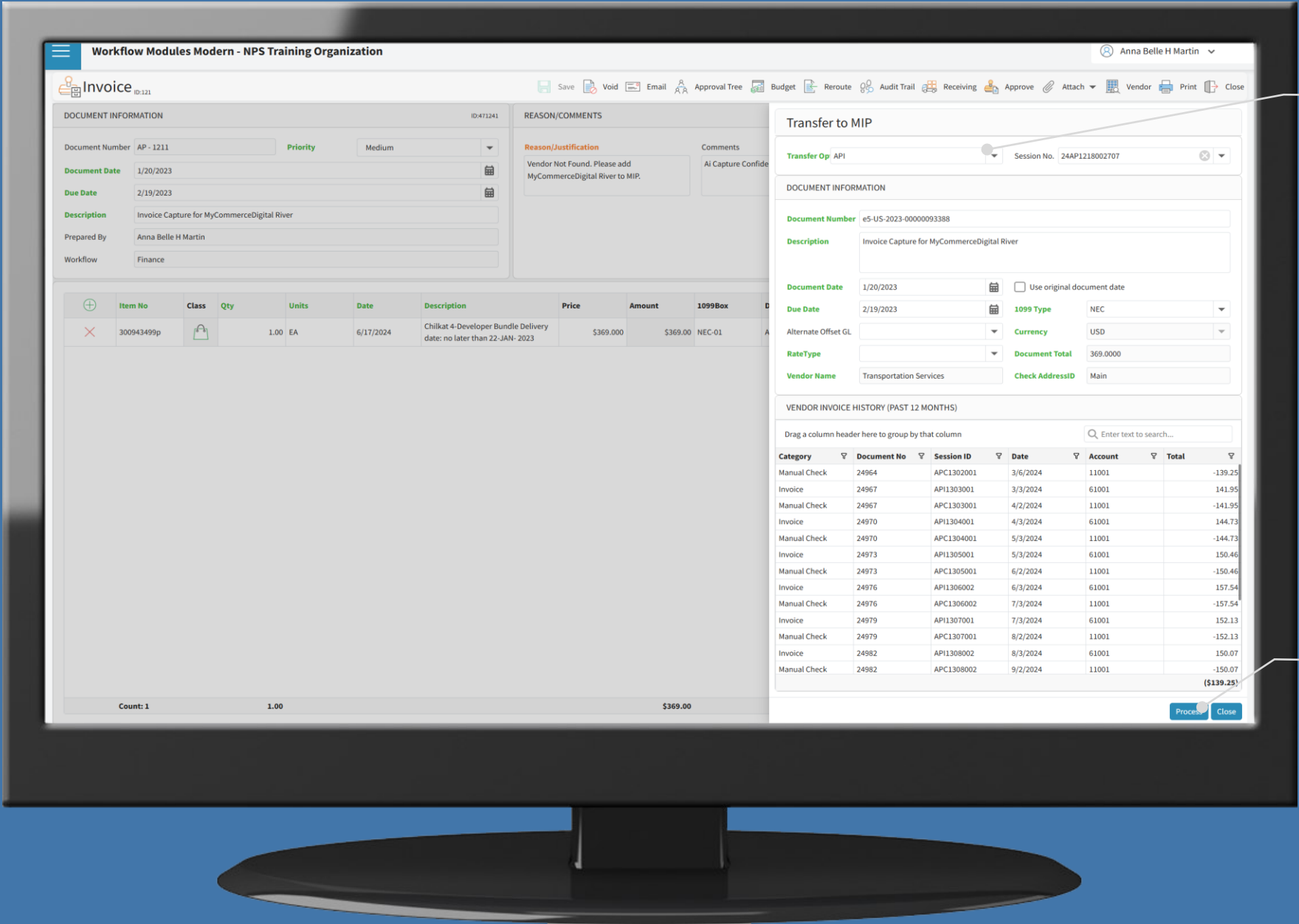
5

Send Export Close

Enter text to search...

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

 **Email:** sales@microix.net

 **Call:** 1-866-MICROIX (642-7649)