Orders

The order archive is a chronological list of all your previous orders. In this section you'll learn how to access your orders, manage them, export data and assign permissions.

How to access the order archive

Web access setup

Once you've signed in to your account, go to 'Orders'.

PunchOut setup

Only the account admin has access to 'Orders' in the PunchOut setup, which can be accessed by signing into the Unite account via the web.

Overview of the order archive

In 'Orders', you'll see a list of your orders, including order number, date, buyer's name, total cost, order status, and a button to export your order history.

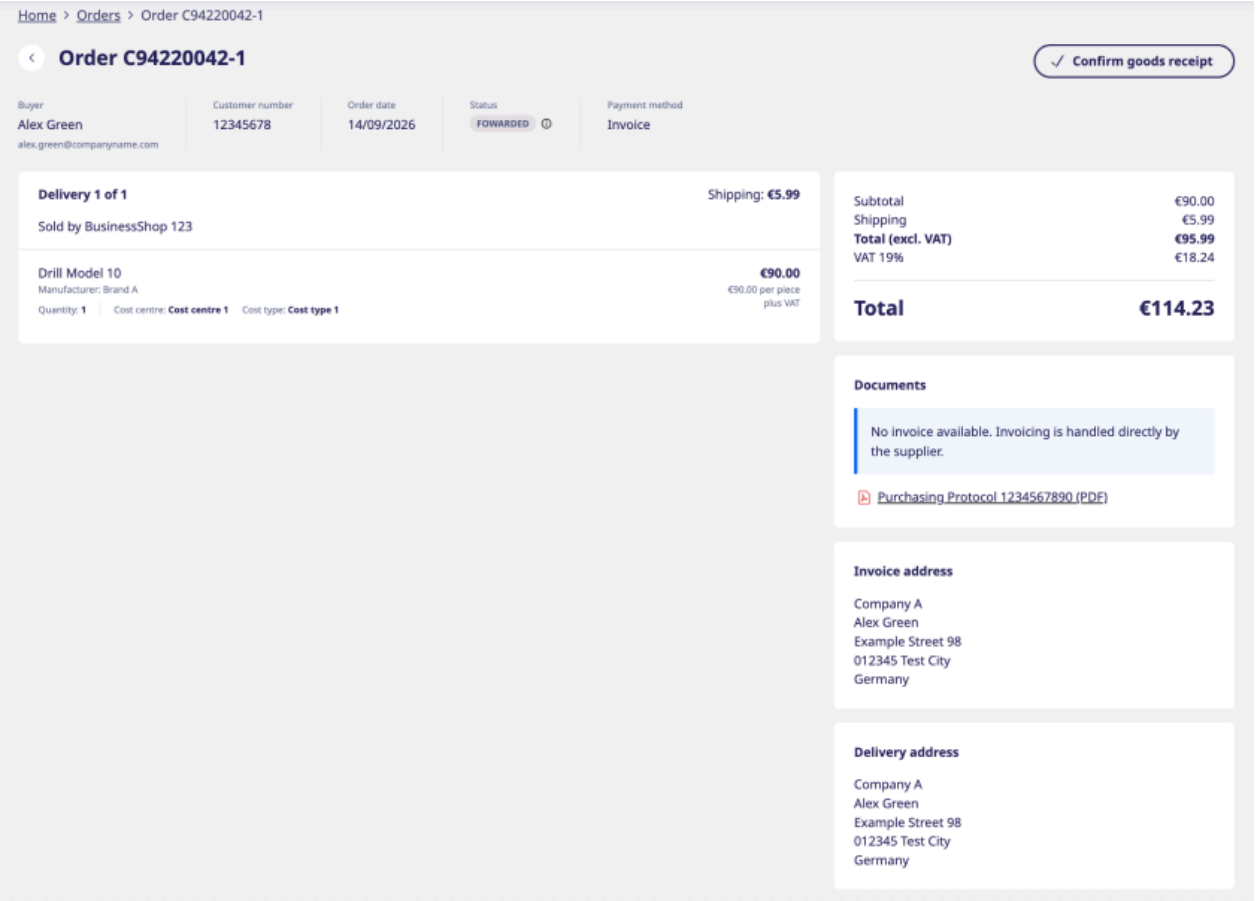


How to manage orders in the order archive

View order details

To see details for a specific order, click on the order number.

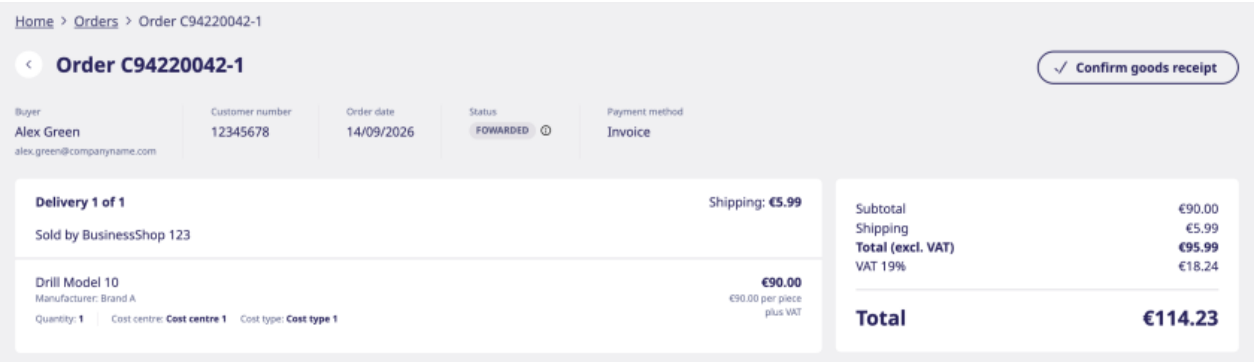
This will take you to the order detail page, which includes the order number, buyer information, customer number, order date, status, payment method, item/items ordered, attached documents (where applicable), and invoice and delivery address details.



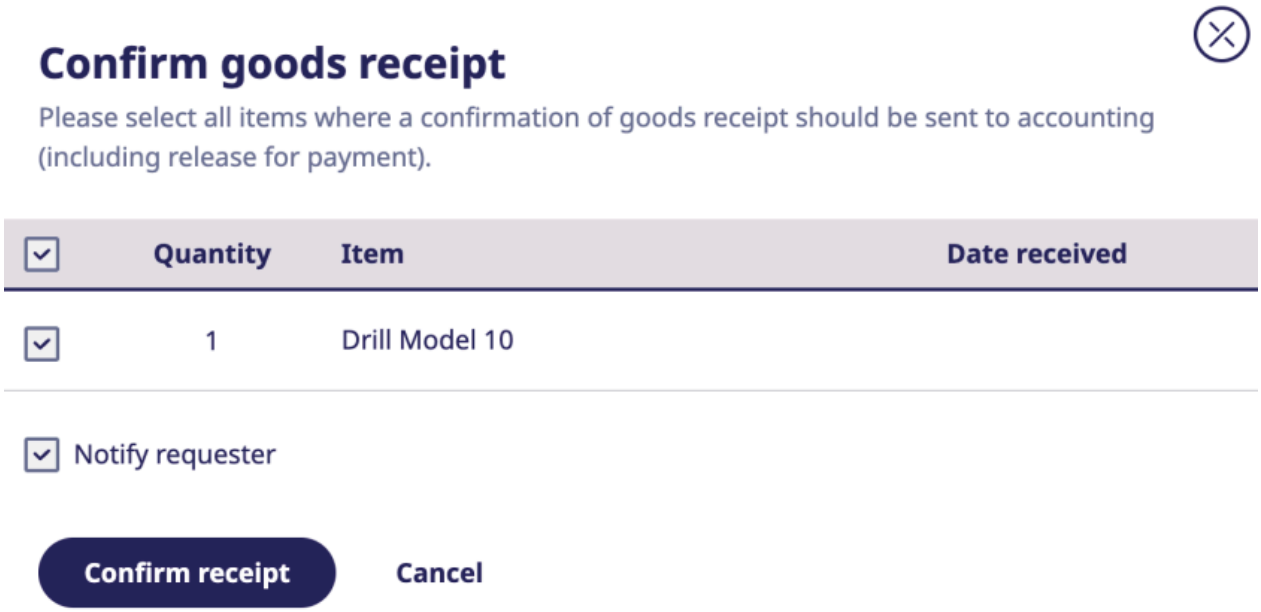
Need support for buying on Unite? Read more here.

Submit a goods receipt

Click on the button 'Confirm goods receipt'.



A pop-up window will appear with a summary of the order.



Confirming goods receipt will:

1. send you a notification that the goods receipt has been saved, and
2. send a notification of goods receipt to your accounting department, including release of payment (only if a default invoice address was saved in your account).

If you're an admin using Unite's user management and approval workflow and want to inform your requester, select the option 'Notify requester'.

How to export your order history

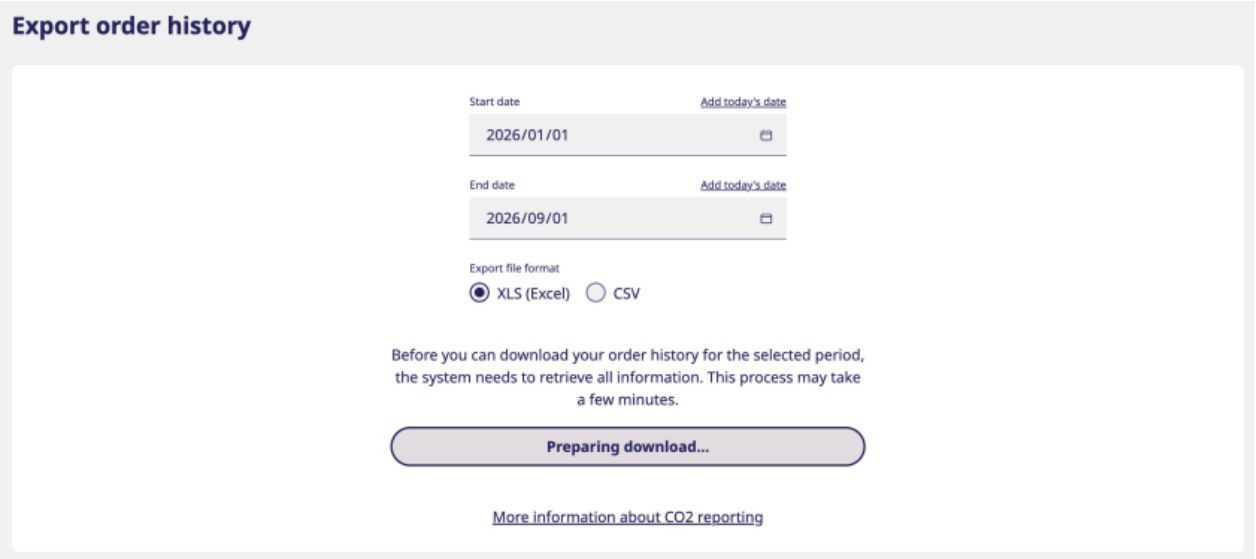
You can export past orders for a selected date range as an Excel. This is especially helpful for order reporting and for evaluating orders, for example, by product group, cost centre or buyer.

Click on the 'Export order history' button.



Select the date range you'd like to export orders from and click 'Preparing download' to download an Excel.

The maximum export period is 365 days.



The Excel will include details about every item ordered during the selected period, including order number, item details, ECLASS, manufacturer, supplier number, cost centre, cost type, invoice and delivery addresses, and goods receipt confirmations.

A confirmation message will appear when the download is complete. Now click the 'Download order history' button or click 'Restart' to start a new export.

For more information about how to analyse data, read the 'Analysing orders with extended order reports' article.

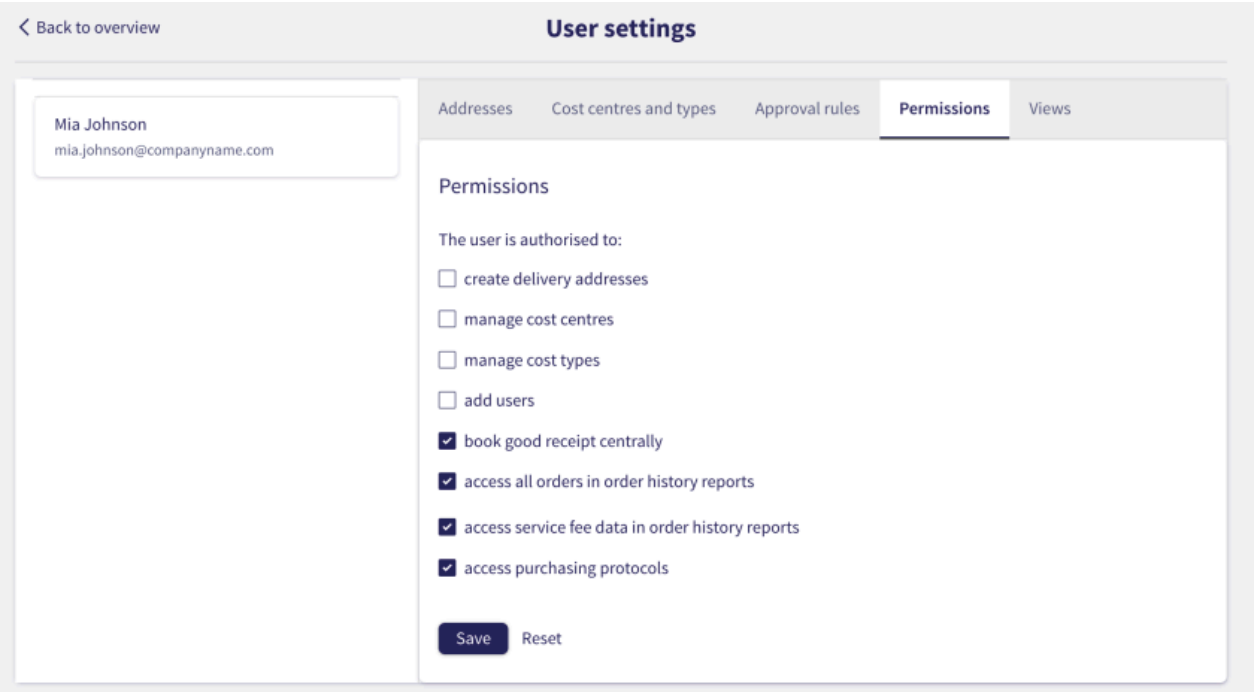
How to assign permissions for the order archive

Web access setup

Go to 'Organisation' and then to 'User management'. Here you can assign rights and permissions to users.

Read more about assigning rights to users

Once you've selected the user you want to assign rights to, click on 'Permissions' and then select the options to assign to the user: book good receipts, access all orders and/or access service fee data in order history reports, and access purchasing protocols. Click 'Save' when you're done.



PunchOut setup

Send an email to service.uk@unite.eu with your customer number and the email address of the user you want to assign rights to. Our Customer Service Team will provide you with further details.