

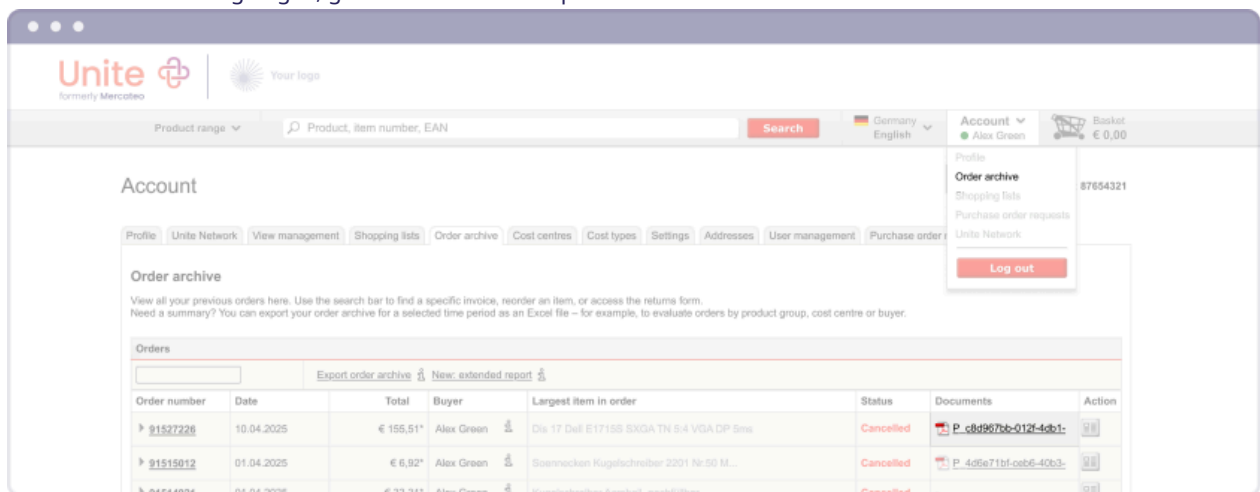
Documenting purchases with the purchasing protocol

For each order on Unite, the purchasing protocol transparently records which offers and criteria formed the basis of your selection. It's created automatically and contains valuable information about your spend, from the selection of offers to detailed price breakdowns.

How to access the purchasing protocol

Web access setup

Find the purchasing protocol in your purchase order requests and, after the purchase request has been approved, in the order archive. After signing in, go to the 'Account' dropdown menu and select 'Order archive'.



PunchOut setup

If you use Unite via PunchOut, a link to the protocol can be transferred to your system.

Or go to the order archive on Unite. In the PunchOut setup, only the account admin has access to the order archive, which can be accessed by signing into the Unite account via the web and following the process as described above.

Content of the purchasing protocol

The purchasing protocol includes the following sections:

- **List of requirements:** Under 'purchase order request' is an overview of all requested items without supplier reference.
- **Offer selection:** The 'offer selection' section shows the selected suppliers and items, including terms and the final shopping basket.
- **Offer overview:** Summary of all received offers.
- **Selection criteria and justification:** The 'total cost of ownership calculation' section lists the selection criteria and, if applicable, any individual additional reasons.
- **List of offers:** The three offers for each request, as required by law. If fewer than three offers are available, three suppliers from the relevant product category are displayed.

How to provide a reason for your decision

Before submitting your shopping basket, you (the requester) can provide an additional reason for your decision. For example, if you choose not to use the basket optimisation option. The additional reason will appear in both the purchasing protocol and the extended order report.

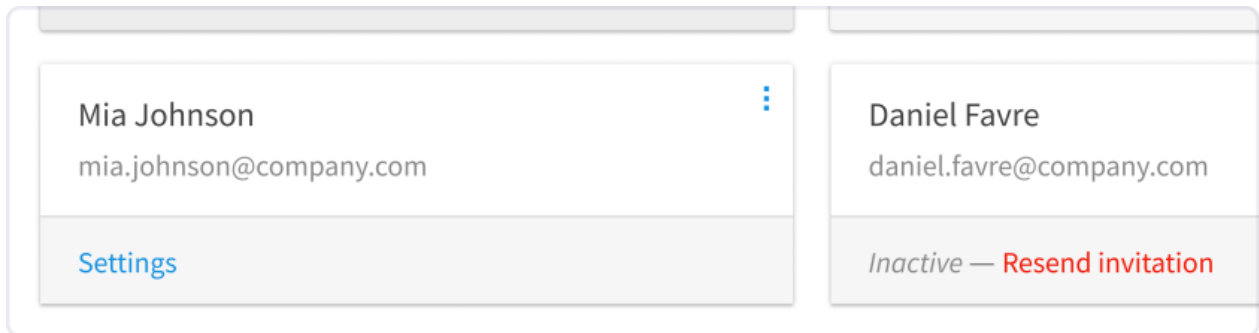
Tip: We recommend regularly saving your reports to fulfil your archiving obligations.

How to assign permissions for the purchasing protocol

Web access setup

In the 'User management' tab, you can assign rights and permissions to users.

[Read more about assigning rights to users](#)



In user settings, click on the 'Permissions' tab and then select 'access purchasing protocols'. Click 'Save' when you're done.

PunchOut setup

Send an email to service.de@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.
