

Setting up the basket-to-ERP solution

A user without an ERP licence can create and share a shopping basket with an ERP-authorized user, who can start a PunchOut session, retrieve the basket using its ID, and complete the order.

With this solution, the purchasing process in your company remains streamlined, with end users without ERP access enjoying the same experience on Unite as users with licences.

How the basket-to-ERP solution works for users with and without ERP access

During the onboarding process, Unite will create an individualised URL to share internally with non-ERP users. These users can then click on the link and start creating a shopping basket on Unite. Once the non-ERP user has added all their items to the basket, they can go to the basket and then click on the 'Save current basket' button.

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A Pop-up appears that shows the basket ID and allows the user to copy the ID.

An email window will pop up, which will be pre-filled with a link to the selected items as well as the basket ID.

The user then needs to enter the email address of the authorised ERP user (licence holder) and send the email.

The non-ERP user can now share the basket ID with an ERP-User using their preferred format (e.g. Microsoft Teams, E-mail, etc.).

The authorised ERP user will receive the basket ID from the non-ERP User and start a PunchOut session through the ERP system. They then navigate to Unite, go to the shopping basket area, and click 'View basket history'.

From there, they click 'Search previous baskets'.

Now the user enters the basket ID.

By clicking the relevant button, the authorised ERP user can add the items from the saved basket to their own basket.

Once done, the user can click on 'Transfer shopping cart' to transfer the basket back to the ERP system and to complete the approval and ordering process.

Please note: If prices of products change from time of creation of the initial shopping basket to the time that the basket is imported back to the ERP system, the prices will be updated in real time.

Please note: To be able to use this Basket-to-ERP Solution, it is required that you configure the parameter externalUserId within the Punchout configuration for Unite.