

Procurement

User Guide



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Introduction

In today's fast-paced business environment, efficient procurement is pivotal to a company's success. The ability to swiftly and cost-effectively acquire the correct goods and services supports operational needs and contributes significantly to maintaining competitive advantage. With Tipalti, you can automate and manage the entire purchasing lifecycle by enhancing your procurement processes and workflows, reducing manual errors, and controlling spend.

This guide provides instructions for starting to manage and execute purchases with Tipalti. For additional information, click on the links or scan the QR codes with your smartphone in the **Latest Resources** sections to be directed to help guides and video tutorials.

Ready to get started? Let's dive into the features and functionalities that will transform your procurement process.

 Some features in this guide require specific user permissions. If you can't access a feature you're supposed to, ask your Tipalti Admin if they can give you access.

Navigation

Knowing your way around the Tipalti Hub is critical for efficient workflow management. This section examines some features you will use regularly, ensuring you can find the necessary information to complete your tasks.

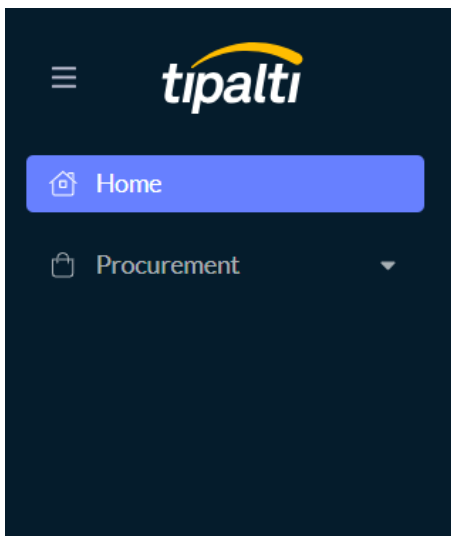
Home

Home is the starting point of your journey in the Tipalti Hub. When you log in to the Tipalti Hub, Home provides quick access to everyday spend-related tasks, such as:

- Submitting and approving bills, expenses, or purchase requests
- Searching for specific records
- Tracking the status of your bills, expenses, or purchase requests

Main Menu

Located on the left side of the screen, the main menu is personalized based on your account permissions and provides access to significant sections of the system, such as:



Home

The primary view for employees to create and approve purchase requests

Procurement

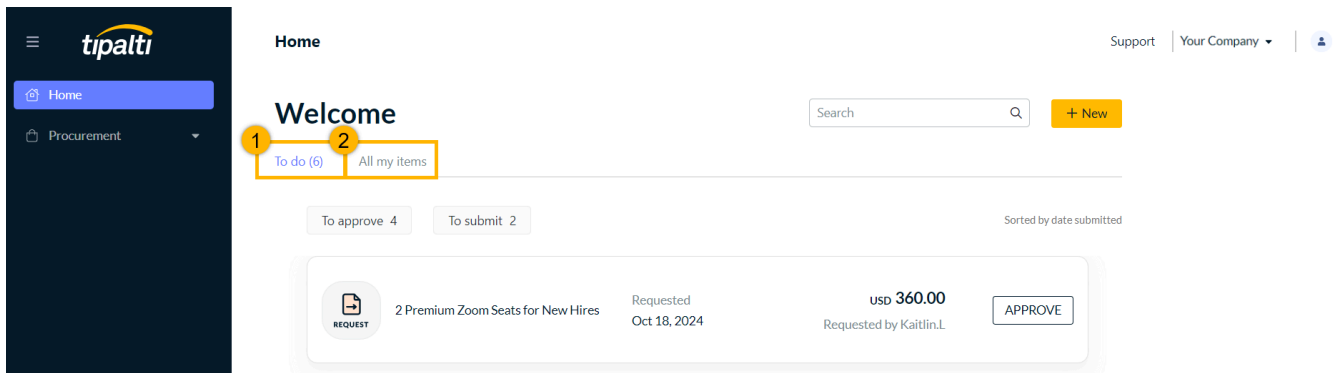
The finance user's view to manage and track purchase requests

Tips for Efficient Navigation

Tabs

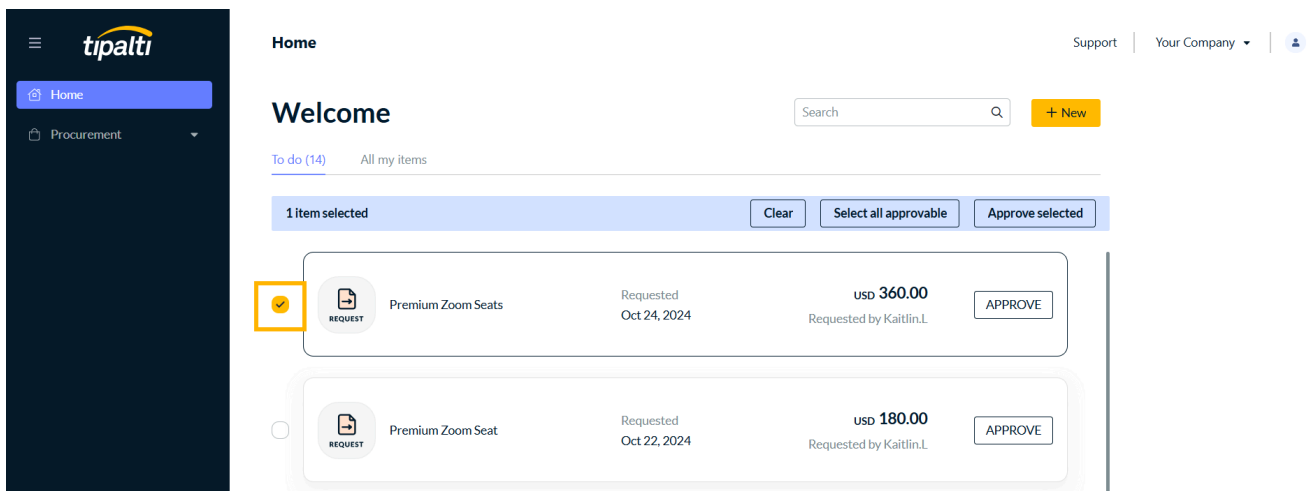
Home includes **To Do** and **All my items** tabs to streamline your workflow.

1. The **To Do** tab shows tasks that require your attention, such as pending approvals or actions.
2. The **All my items** tab shows all records you can access.



Multi-select Actions

Need to approve multiple purchase requests? You can efficiently approve multiple requests simultaneously with just a few clicks. Simply hover over a record and click the checkbox on the left side to enable multi-select actions. Select all the records you want to approve.



Submit Purchase Requests

When you need company approval for a purchase, such as new software licenses or equipment, you can handle it directly within Home. You can create a purchase request in two ways: by writing what you want to purchase in a text box or by manually filling out a form.

Latest Resources

Scan the QR code or click on the link to be taken to the latest resources.

Help Guide



bit.ly/4hmJB4L

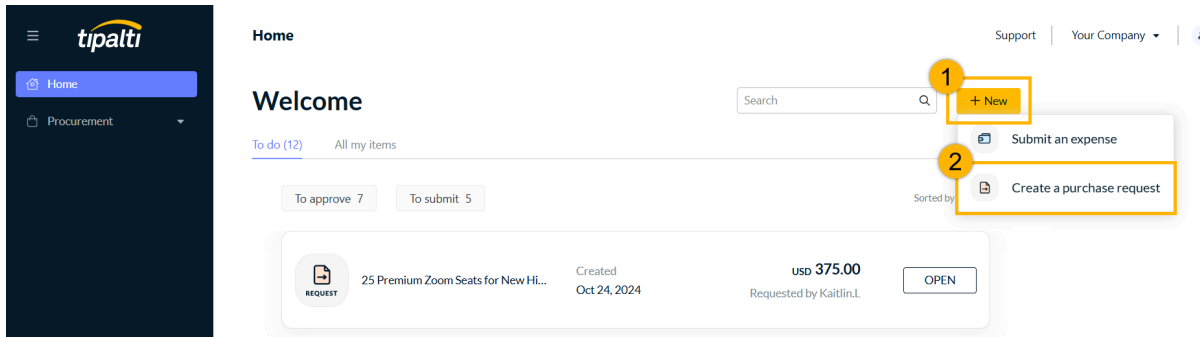
Video Tutorial



bit.ly/3NDDrjF

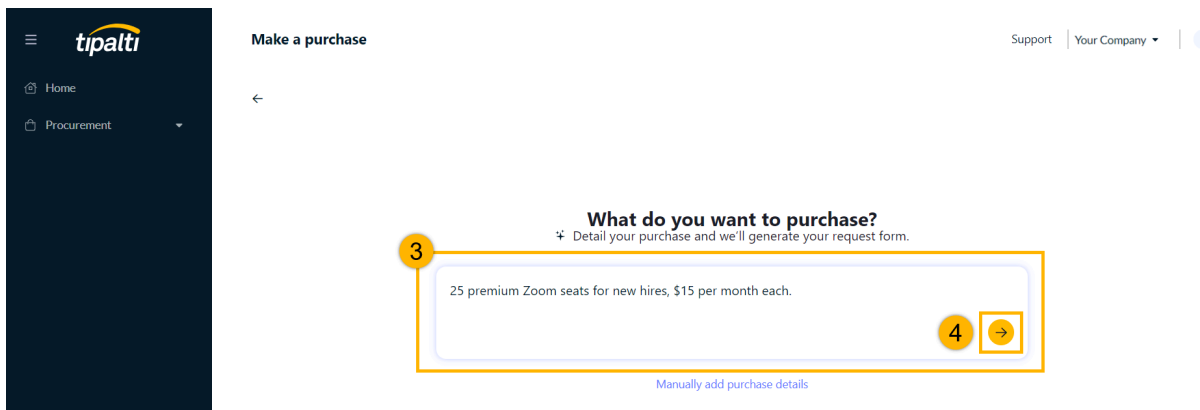
Submit Purchase Requests Using Tipalti AI

1. From Home, click on **+ Create request** or **+ New** at the top right.
2. Select **Create a purchase request** from the dropdown menu.



3. Enter the details of what you want to purchase, the reason for the purchase, who you're purchasing it from, and the total cost in the text box.
4. Click the **submit** icon.

Tipalti AI will use this information to complete the rest of the form, saving you time and effort.



- Review the prefilled information in the form and make any necessary edits.
- Click **Next** to navigate through different sections in the form.

tipalti

Support | Your Company | User

STEPS

- Purchase details
- Finance
- Confirm & submit

Purchase details

Purchase request was generated with AI, please review before submitting.

Title
25 Premium Zoom Seats for New Hires

Purchase type*
Subscriptions

Vendor
Zoom

Department
IT

Location
Select...

Description
25 premium Zoom seats for new hires at \$15 per month each.

How much?	Quantity	Total

Cancel Save to drafts **Next ->**

?

- When you're ready to complete the purchase request, click **Confirm & submit**.

tipalti

Support | Your Company | User

STEPS

- Purchase details
- Finance
- Confirm & submit

Confirm & submit

Purchase details

Purchase request was generated with AI, please review before submitting.

Title
25 Premium Zoom Seats for New Hires

Purchase type*
Subscriptions

Vendor
Zoom

Department
IT

Location

Description
25 premium Zoom seats for new hires at \$15 per month each.

How much?	Quantity	Total
USD 15.00	25	USD 375.00

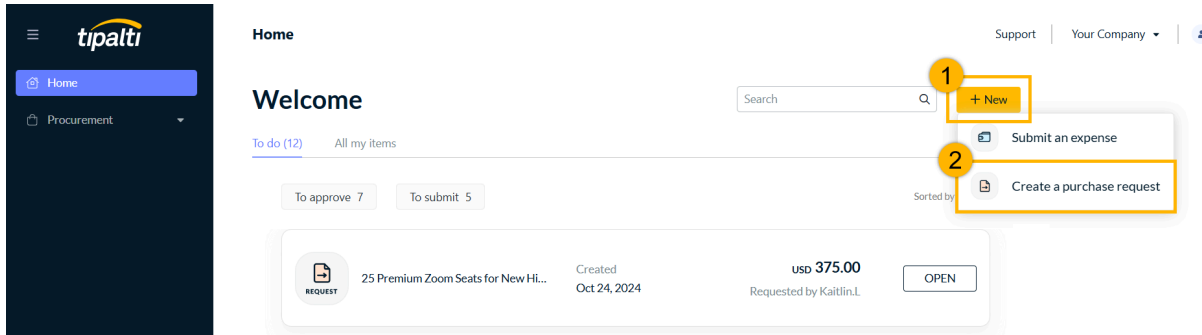
Upload Documentation

Back Save to drafts **Confirm & submit**

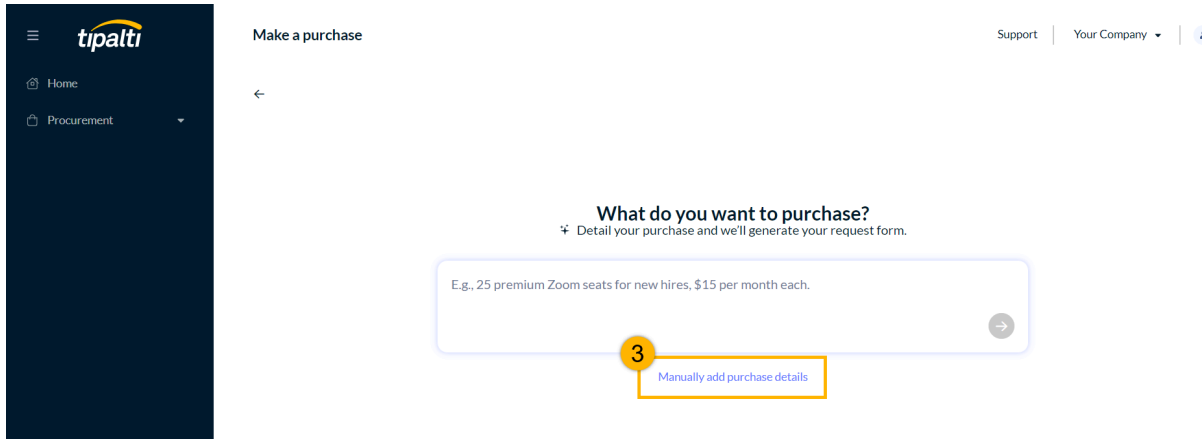
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Submit Purchase Requests Manually

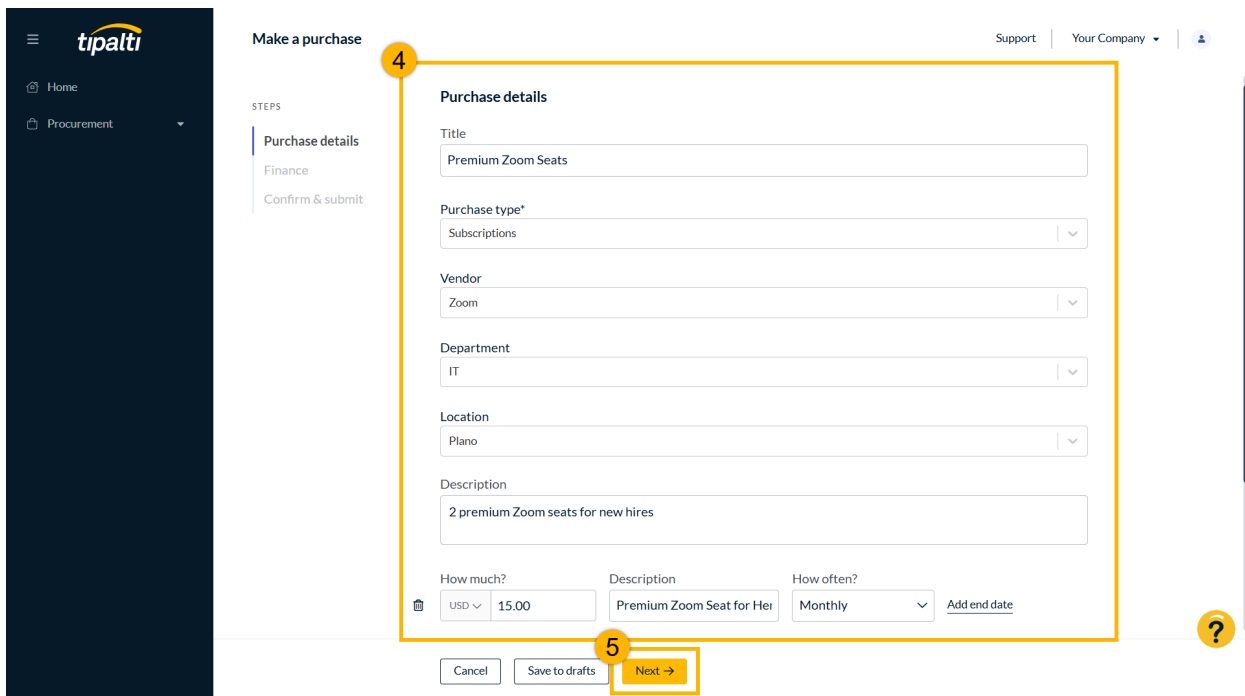
1. From Home, click on **+ Create request** or **+ New** at the top right.
2. Select **Create a purchase request** from the dropdown menu.



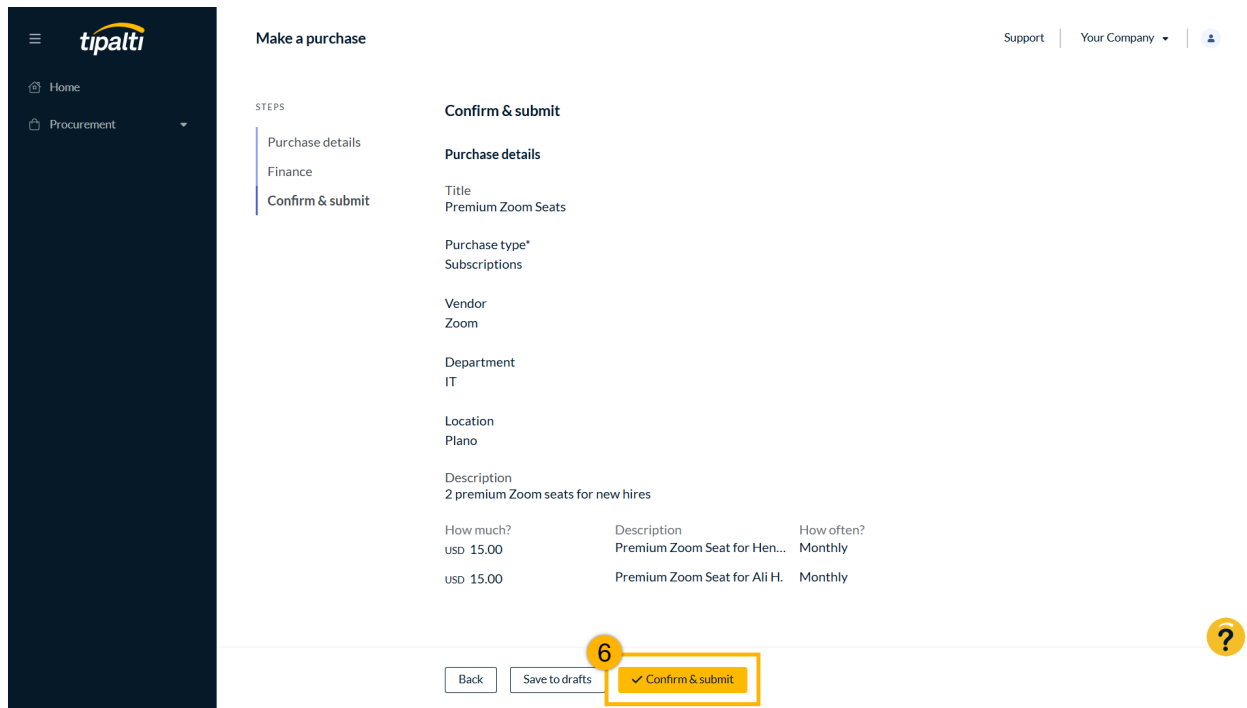
3. Click **Manually add purchase details** below the text box



4. Fill out the required fields, including what you are requesting, why you need to purchase it, the cost, and a brief description.
5. Click **Next** to navigate through different sections in the form.

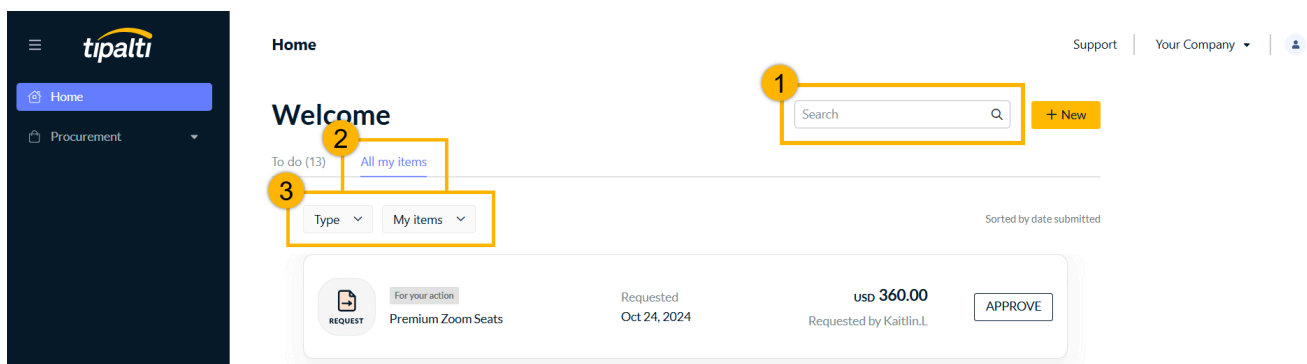


6. When you're ready to submit the purchase request, click **Confirm & submit**.



Track Purchase Requests

When you submit a purchase request, Tipalti will automatically forward the request to the designated approvers. You can track its progress from the (1) **All my items** tab in Home. To find specific items, you can (2) search for them or use the (3) **Type** and **My items** filters. The status of your request displays, and you can click it to view more details.



Approve Purchase Requests

The procurement approval process acts as a quality check, ensuring that requests align with organizational goals, budgets, and strategic priorities. With Tipalti, this process is streamlined to be efficient, transparent, and easy to manage.

Approval Notifications

Effective communication is a cornerstone of the approval process. Approvers receive real-time notifications of pending requests through email or Slack, ensuring prompt action and decision-making.

Lastest Resources

Scan the QR code or click on the link to be taken to the latest resources.

Help Guide




bit.ly/40fSwi8

Video Tutorial




bit.ly/3YiDmWP

25 Premium Chairs (req-12) is pending your approval



Hi Approver Name
A new purchase request is pending your approval.





GENERAL

Requested by Employee Name Team Lead	Vendor Furniture Company	Request ID req-12
Subsidiary Your Company	Description Request for 25 premium chairs for the team. Operations	Department
Location Foster City		

PRICING

Item	Quantity	Total
USD 1	25	USD 25

APPROVAL FLOW

-  Employee Name (Team Lead)
-  Department Owner

[Go to Tipalti Hub](#) to see all of the request's details.

Thanks,
The Tipalti team

Within your email notification for purchase requests pending your approval, you can view all pertinent details and contextual information necessary for an informed decision. The email includes key details of the request, such as item lists, quantities, vendor information, and cost.

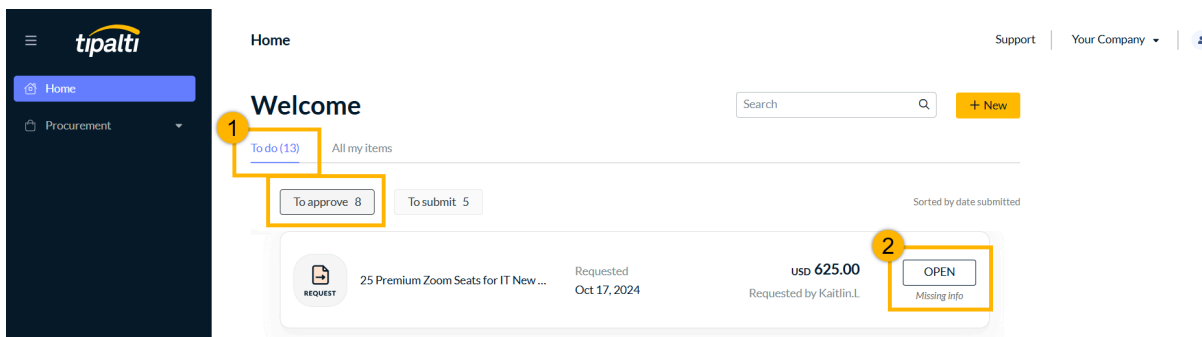
At the bottom of the email, you have the option to click **Reject** or **Approve**. Clicking either of these buttons will direct you to the Tipalti Hub. After logging in to the Tipalti Hub, click the **Home** icon and proceed to approve or reject the request following the steps listed in the next section.

Review a Purchase Request via the Tipalti Hub

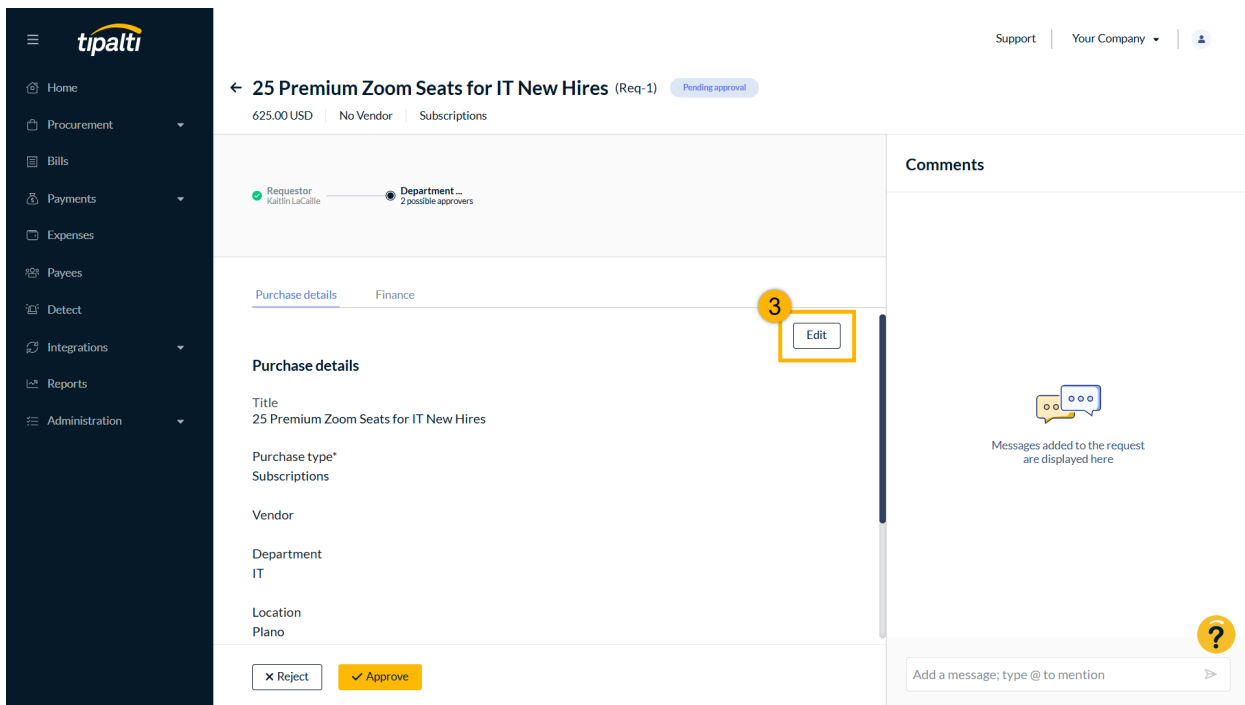
Once purchase requests are submitted, they appear in the approvers' queue. Tipalti enables approvers to edit purchase requests, ensuring accurate and detailed requests. You can tell if you need to provide more information before you can submit the request as **Missing info** displays under **OPEN**.

Here's how to review and edit purchase requests.

1. Log in to the Tipalti Hub and click on the **To do** and **To approve** tabs.
2. Click **OPEN** to view a purchase request's details, including item descriptions, quantities, vendors, and costs.



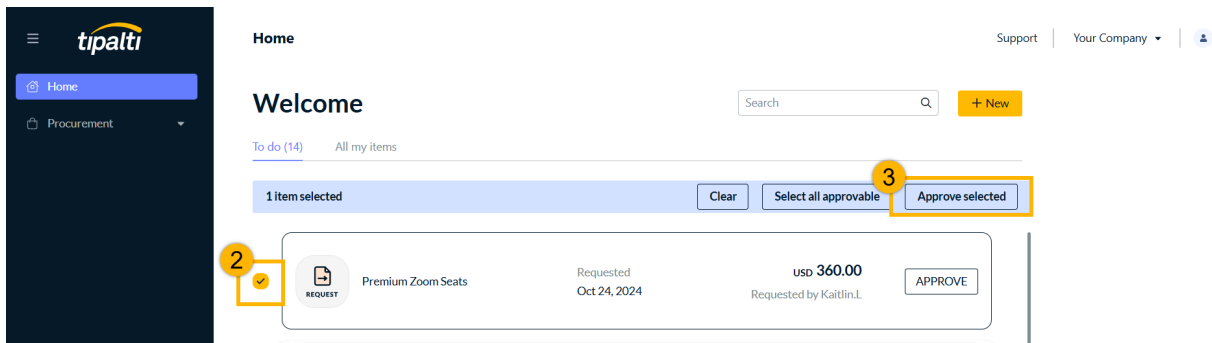
3. To make any changes, click **Edit** in the top right of **Purchase details**.



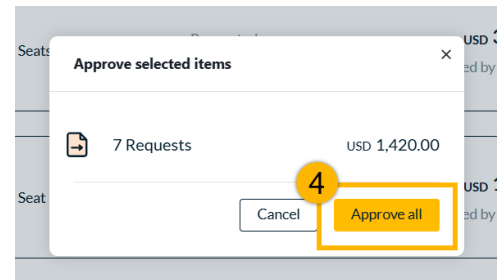
Approve Multiple Purchase Requests via Tipalti Hub

You can efficiently handle multiple purchase requests at once with just a few clicks.

1. Hover over a purchase request.
2. Click the **check box** to the left to enable multi-select actions.
 - a. Choose all the records you want to approve.
 - b. Or, click **Select all approvable**.
3. Click **Approve selected**.

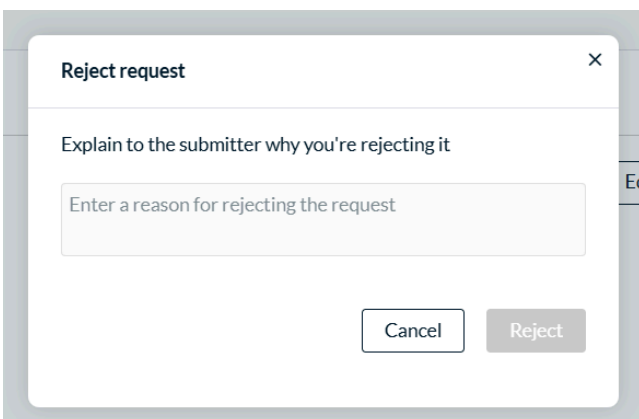


4. A summary will appear showing the number and sum of all purchase requests you're about to approve. Click **Approve all** to approve the purchase requests.



Reject Purchase Requests

Sometimes, the most appropriate action is to reject a purchase request. For example, if the request falls outside budget constraints, lacks necessary documentation, or does not align with business objectives.



When you open a purchase request and click **Reject**, you'll be prompted to add why the request was rejected. Provide clear and constructive feedback, as this information will be shared with the requester. When a request is rejected, an automated notification with your reasoning will be sent to the requester.

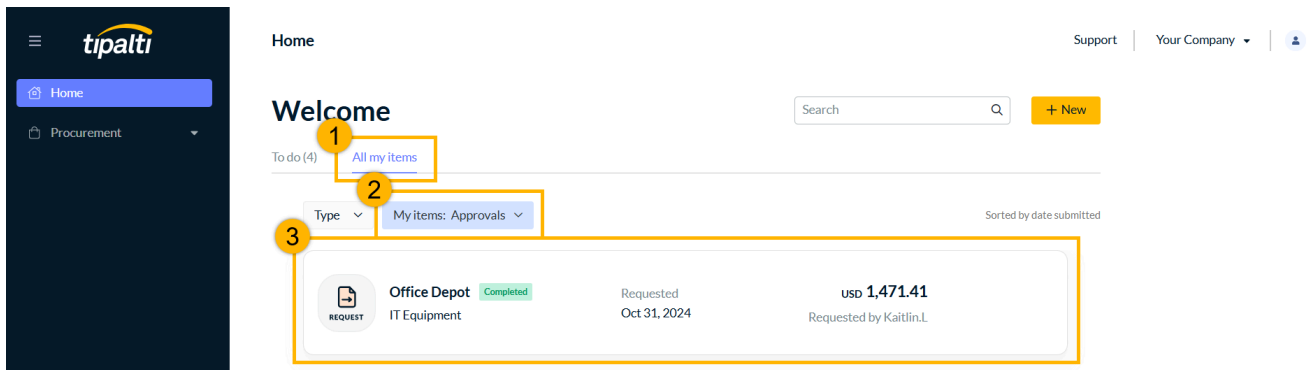
Receivals

In Tipalti, you receive an email after a PO is created to let you know you can mark which items are received as they arrive. This helps your finance team keep track of your purchases and manage the company budget.

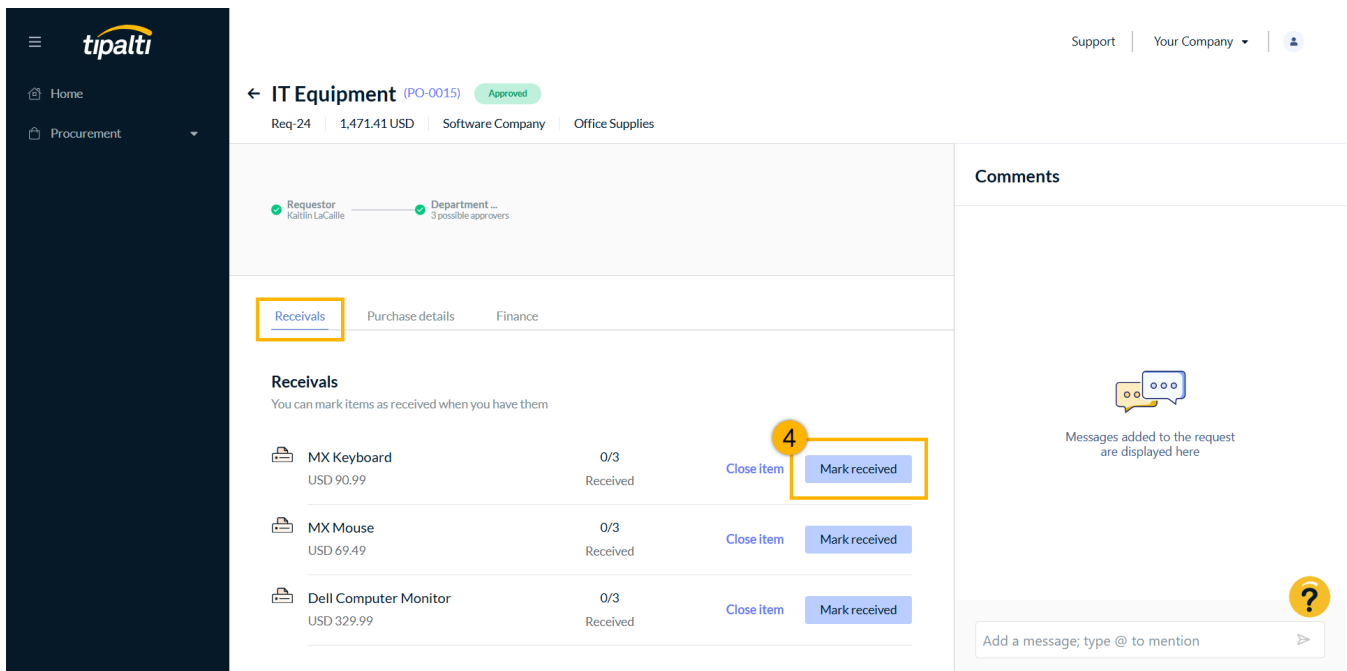
Mark Items As Received

To mark which goods or services you received:

1. Click the **All my items** tab.
2. Select **Approvals** from the **My items** dropdown.
3. Click on a **Completed** purchase request.

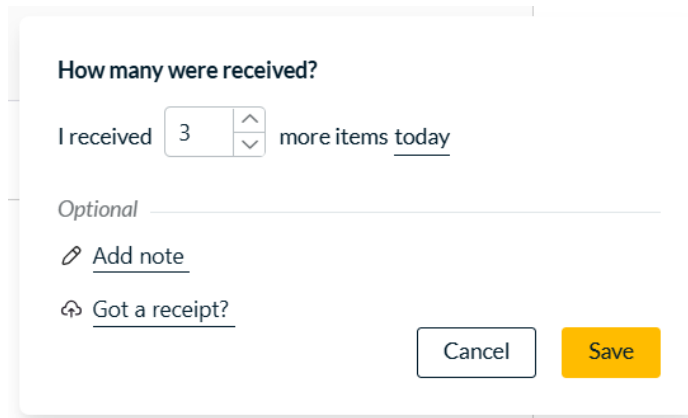


4. In the **Receivals** tab, click **Mark received** to the right of the item.



5. A pop-up displays asking you **How many were received?**

- a. Enter how many of that item you received so you can record if you received the full quantity you ordered of that item or less than the full quantity.
- b. If you didn't receive them today, click today and select the date you received them.
- c. **Optional:**
 - Click **Add note** to add a note about the purchase.
 - Click **Got a receipt?** to upload a purchase receipt for that item.
- d. Click **Save**.

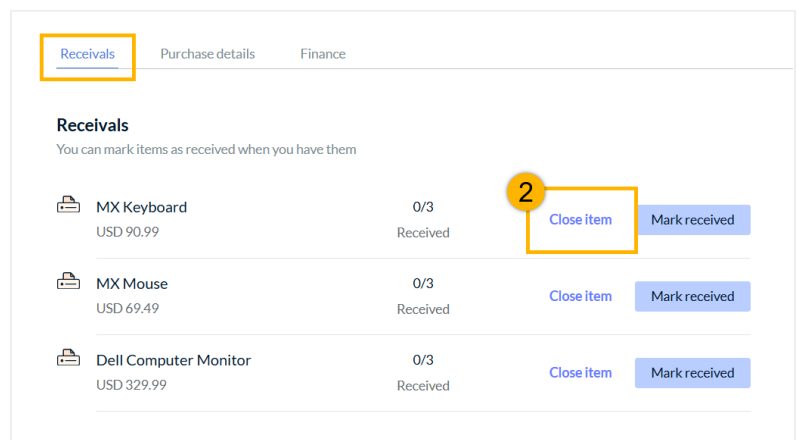


Close Unreceived Items

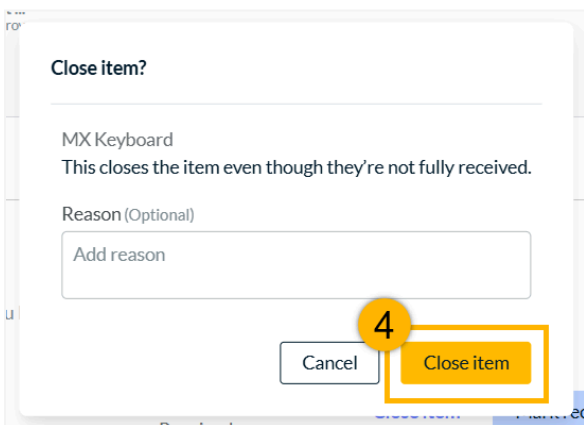
To complete a purchase request, all items on the request need to be received or closed. If you didn't receive all items, you can close items to complete the request.

To close an item where you didn't receive the full quantity you requested:

1. Open the purchase request.
2. In the **Receivals** tab, click **Close item** to the right of the item.



3. **Optional:** Enter why the item wasn't fully received for your records.
4. Click **Close item**.



Support

We are dedicated to helping you realize the benefits of the Tipalti Hub as quickly as possible and offer several ways to access additional information and training to help you get full use of the Tipalti Hub.

Resource Center

Within the Tipalti Hub, you'll find a question mark bubble at the bottom right corner of the navigation bar. Click on this icon to open the Resource Center, where you can:

- Access on-demand guides tailored to specific tasks.
- Discover “What’s new” with feature announcements.
- Chat with our Support team or open a ticket for asynchronous help.
- Leave feedback about your experience.



Additional Help

For detailed documentation and video resources, visit Tipalti’s support sites for comprehensive help and learning opportunities.

- **Help Center**
Visit support.tipalti.com for a wealth of articles, FAQs, and guides. These resources provide step-by-step instructions and insights across all Tipalti functionalities.
- **Get Started**
Begin your journey with Tipalti by visiting getstarted.tipalti.com. This site offers how-to videos and articles that walk you through essential processes, making learning Tipalti quick and easy.



Maximum Visibility and Control with Unmatched Efficiency
One connected, unified workflow to simplify your entire intake-to-procure process.

Get Started