How to create additional user(s):

1. Go to preferredmedical.com and sign into your web account using your credentials. If you are a returning Preferred Medical customer logging in after June 20, 2022, you will be asked to reset your password. Incoming Wolf Medical Supply customers do not need to reset passwords.

2. As an administrator for your account, you will now be able to add users to your account and define their role for ordering.

3. Click your username from the top right homepage to access your account.
   In the drop-down, select "User Administration".

4. View all current users under your account and use the search feature to quickly find an existing user.

5. Creating a NEW User:
   a. Select the "Create New User" button in the top right corner.
   b. Enter the Username, Email, First Name and Last Name.
   c. Under Settings you can select:
      i. Assign User Role – See the descriptions of all user roles below
      ii. Assign Approver – The approver can be assigned to anyone with administrator permissions
   d. You can edit a user role at any time by searching for the user you would like to modify and selecting their username. The available options to update are:
      i. Assign a Ship To address
      ii. Edit their Email, First Name, Last Name
      iii. Change their User Role
      iv. Set Budget Restrictions
      v. Assign Approver
      vi. Deactivate users by unchecking the box next to "Activation Status"
   e. When finished, click the green "Save" button in the upper right of the page.

6. Defining User Roles* and Permissions:
   a. **Administrator** – The Administrator role is assigned to the customer administrator. Typically, a senior buyer who also manages all buyers for the organization. The Admin can set up new buyers, assign ship to addresses, manage budgets and view all orders/invoices for the organization.
   b. **Buyer 3** – [DEFAULT] The Buyer 3 role is typically assigned to a senior buyer who has no budget restrictions and does not need to have orders approved. This role can also serve as an approver.
   c. **Buyer 2** – The Buyer 2 role is typically assigned to an associate buyer. Users with this role can create orders without approval if they remain within their specified budget restrictions. Any orders that exceed their budget restrictions must be approved. This role must have an assigned approver.
   d. **Buyer 1** – The Buyer 1 role is typically assigned to a junior buyer, where all orders created must be approved. This role must have an assigned approver.
   e. **Requisitioner** – The Requisitioner role may only submit requests to purchase products. This role must have an assigned approver.

*** Please note: if you do not assign a user a role, they will default to the permissions of a Buyer 3.**

Reference the following chart to review permissions available at each user role level:

Permissions	Administrator	Buyer1	Buyer2	Buyer3	Requisitioner
General capabilities for approving and ordering	(User admin and default approver)	(All orders must be approved)	(Can place orders within specified budget)	(Can place orders without approval/act as approver)	(Can only request to order items)
Access/Configure Budget Management	X				
Submit items for Requisition					X
Create New Users	X				
Deactivate Users	X				
Edit Users	X				
Assign/Edit Ship To	X				
View & Approve Requisitions	X				
View Invoice History	X			X	
Orders Require Approval (All)		X			
Orders Require Approval (Over Budget)			X		
Approve Orders	X			X	
View Saved Orders	X	X	X	X	
Save Orders	X	X	X	X	
View Order History	X	X	X	X	
Request Quote	X	X	X	X	
View Quotes	X	X	X	X	
View Approvals	X	X	X	X	
Add Wishlist	X	X	X	X	X
Edit Wishlist	X	X	X	X	X
Delete Wishlist	X	X	X	X	X

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