



Punch-out Process Details

Overview

Companies use procurement systems as a way of managing users' spending through the use of approval processes and purchase orders. One solution offered through MimeoConnect is a punch-out site. This provides a way for Mimeo to be seamlessly integrated in to the existing procurement ordering and approval processes of clients.

How It Works

Users will log into their procurement system, and then access Mimeo through a link within that system. When a user places a Mimeo order, the Mimeo system puts the order on hold and sends a requisition (request for approval) to the procurement system. Once the user's manager approves the purchase in the procurement system, it will transmit a Purchase Order back to the Mimeo system, which will then automatically release the order for printing.

Integrations to Date

We have developed punch-out integrations with three procurement systems: GE's (Oracle) iProcurement system, Ariba and Coupa. Any client currently using one of the above systems internally, can easily integrate with Mimeo's punch-out site.

Below are the highlights of the process as they affect Mimeo purchases.

Single Sign On

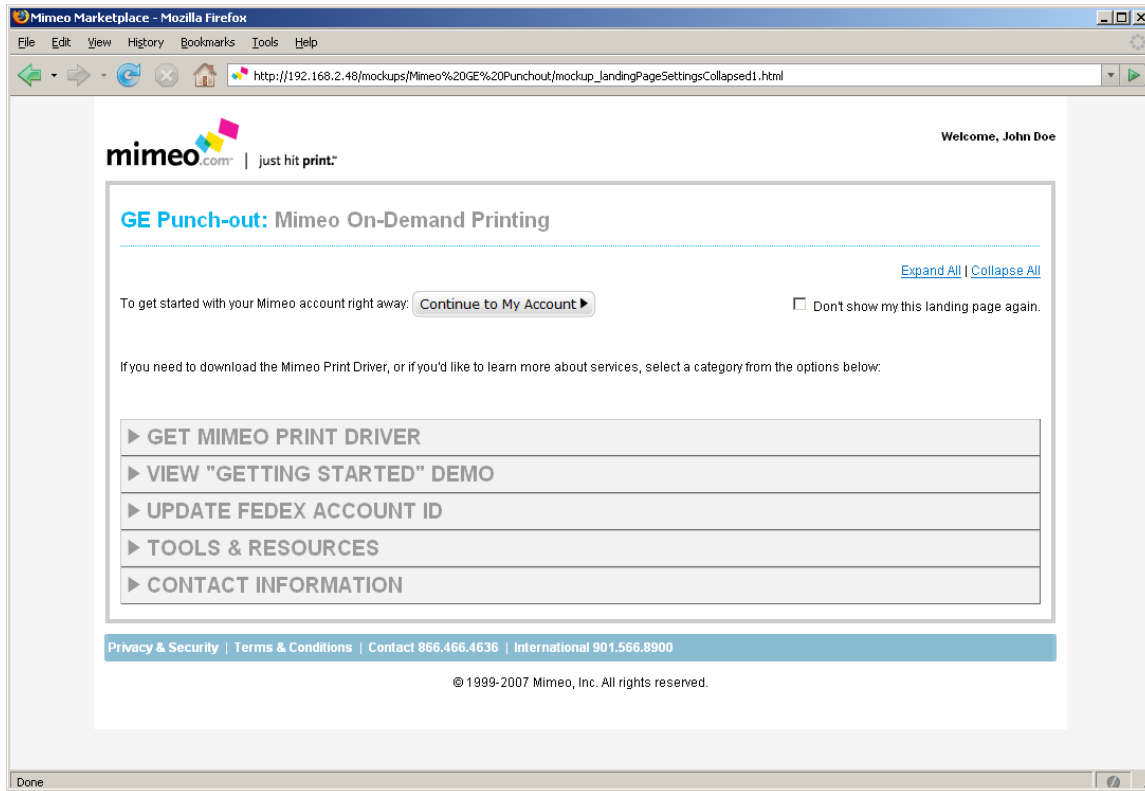
An advantage of the punch-out integration is the ability to eliminate the need for multiple security log-ins through a process called single sign on. Once a punch-out user logs in to their procurement application, there is no need for them to log-in to the Mimeo site as well. Their credentials are passed to Mimeo through the single sign on technology. For example, if the email is an existing Mimeo account, the user will be automatically logged into the Mimeo punch-out site without having to enter their password. If it is a new user to Mimeo, they will be prompted for a password, in order to create a new account automatically.

Note that email address and password will still be required to use the print driver.

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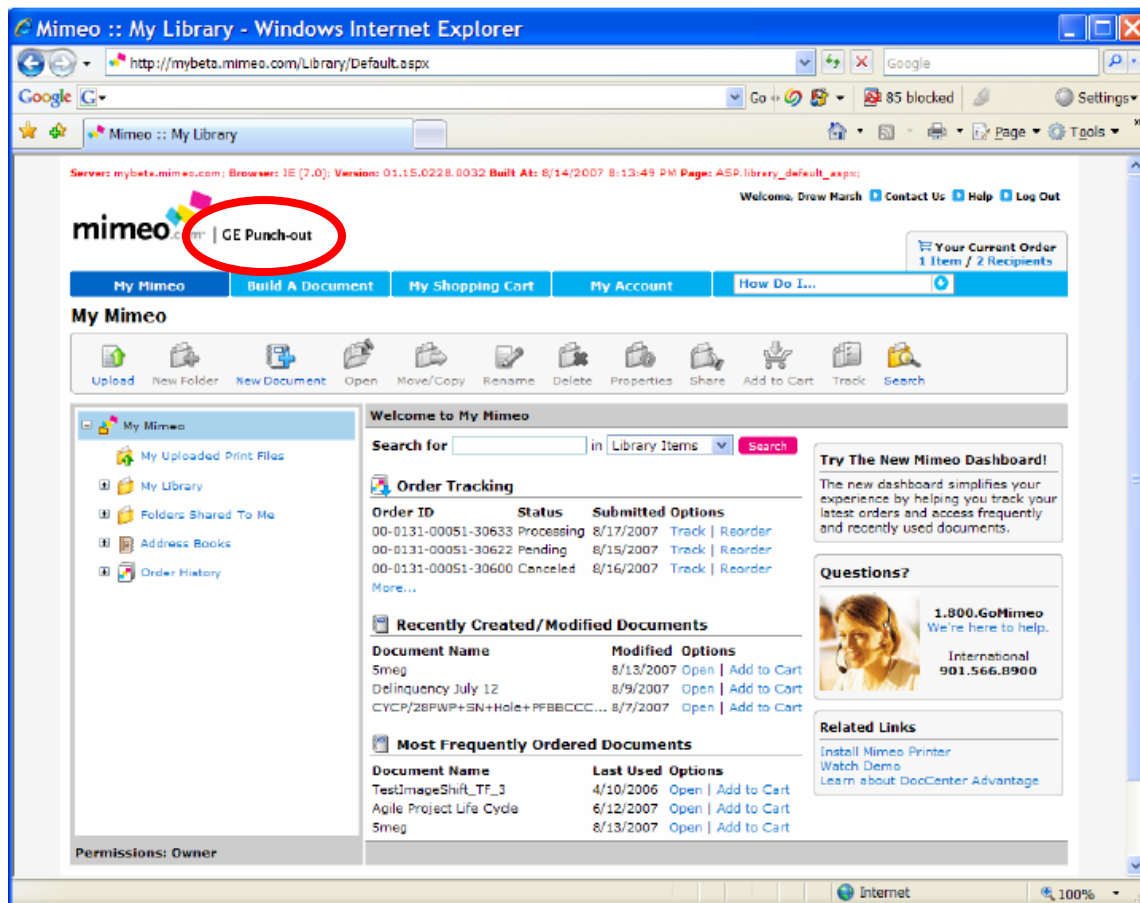
Special Punch-out User Settings

Once logged in the user could be directed to a special punch-out landing page where they can select preferences such as by-passing the landing page for future visits, or identifying their custom FedEx shipping account. These preferences can be set either on the landing page or in the My Account section (if that feature is enabled for their organization). This landing page is optional.



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New and existing users are automatically placed into the proper Mimeo Organization based on the information sent from the procurement system. The organization is marked as 'punch-out', so all users in that organization will inherit the punch-out preference and functionality from the organization. This is important because a punch-out user is required to log in to Mimeo through their procurement system in order to access their shopping cart. If a punch-out user logs into Mimeo directly, instead of through their procurement system, they will get an error message if they attempt to access the shopping cart. All other actions are allowed. A user will know if they are logged into the punch-out site based on the custom logo that appears near the top left of the screen. (e.g. "GE Punch-out")





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Placing an Order:

Once a punch-out user continues past the landing page their document building and shopping experience are normal, with the exception of the final payment page. They will not have options of payment methods such as Credit Card or Account Credit. The only option is Request For Approval.

Once the user selects this, the request will be transmitted to the procurement system. A Mimeo order will be created and placed with a Status of "Pending". An order in Pending status will not be sent to the production floor.

The request will be approved by the user's manager in the customer's procurement system which will then transmit a PO to Mimeo. Assuming the PO is received on time, the order will be set to "Submitted" status and then follow the normal production flow. The PO includes the PCard or account credit information to charge for the order. This information will be recorded in the Mimeo database.

Late Approvals:

Mimeo's standard cutoff time for orders is 10pm Eastern, meaning that most orders received by that time can be shipped out that same night. For a punch-out order, that cutoff represents the time when the PO approval must be received by (NOT when the original request is placed). There are special options to deal with Late Approvals, which may be enabled or disabled for an organization. On the final payment page punch-out users may have one or more choices of what to do in the event that approval is not received by the cutoff time for the order. They are:

- *Option 1:* "Submit Whenever Approved" – Order will be submitted whenever approval is received.
- *Option 2:* "Expire if late approval" – If approval is received after the cutoff time then the status will be set to "Expired" and the order will never be processed.
- *Option 3:* "Upgrade Shipping If Necessary" – This option is only available for single-recipient orders where the shipping method chosen is *not* overnight. If the approval is received after the cutoff, but can still meet requested delivery date by upgrading the shipping method, it will be changed to overnight shipping and the order adjusted. If it is too late to meet the requested delivery date even with a shipping upgrade, then the order will be expired.

Expired orders may be easily re-ordered, just like any Mimeo order. A new Mimeo order ID will be issued.

Buffers

If the shipping needs to be upgraded (as per *Option 3* above), or the order requires offline manual adjustments, then the final order total could be higher than when the order was originally placed. If Mimeo tries to charge the PCard or send an invoice for a higher amount than what the PO was for, then it could be rejected for payment. In order to minimize the chances of this we can add a certain buffer to the PO request amount. The order total in the Mimeo system is NOT affected by this buffer, it is only added to the PO amount in order to cover any increases in costs after the order is placed. These buffers may be enabled or disabled for an organization.

Production Buffer: For any order that includes SIs marked as Require Offline Adjustment, the system will add a percentage buffer to the PO request total. This percentage is predefined by the client during the punch-out planning process. E.g. GE will have 5%, while E*TRADE will be set to 0%.

Shipping Upgrade Buffer: For any order where Option 3 (above) is selected, a buffer may be added to the PO request total in order to cover the upgraded shipping cost if necessary. Again this is configurable by client. E.g. GE will have the possible increase in shipping costs added to the PO request, but ETrade will not. Either way, if the shipping upgrade is actually triggered, the order will be adjusted automatically to add the additional ship charges.

Payment Types:

A new payment type has been created for Punch-out orders called 'Purchase Order'. That is the payment type displayed in the tools when the request is submitted. Once a PO is received, the actual payment method of the order is recorded (account credit vs Pcard) and the purchase order number is also stored in the Mimeo database.