MainStem

PURCHASE PRO™ / CUSTOMER GUIDE

# Your guide to MainStem 2.0

The user experience transition
from MainStem 1.0 to 2.0

Practical steps. Focused screenshots.
Less time retracing your work.

2.0

**Find. Focus.**
**Move forward.**

- Search across your work
- Keep your list in view
- Code with confidence
- Make it your workspace

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Prepared by **MainStem Phenom**

Screenshots captured in Demo. Example identities and selected record data have been replaced for illustration. Features depend on role, configuration and release.

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# Find the task you need

Read straight through, or jump directly to a workflow. Page numbers and entries are clickable.

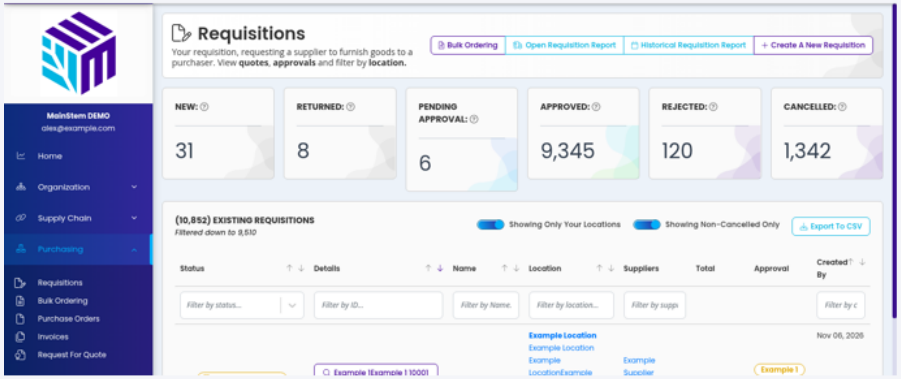

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**Before you begin:** This guide explains the 2.0 experience, not a change to your approval authority or accounting policy. If your screen differs, check your permissions, organization setup and current release.

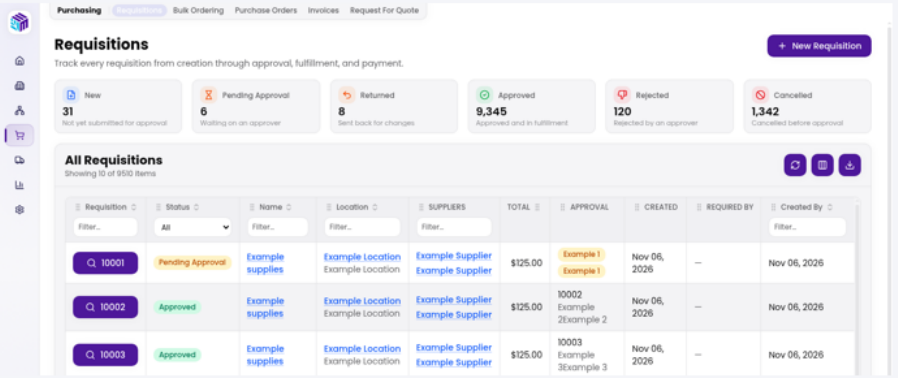
# A familiar workflow. A faster workspace.

The purchasing process stays familiar; the way you find, review and move through work changes.

1.0 / Familiar purchasing structure




2.0 / Compact navigation and consistent controls




DEMO SCREENSHOT • Generic example data • Controls shown may vary by role and configuration

### What carries forward

Requisitions, approvals, purchase orders, invoices and your organization's purchasing rules remain the core workflow. Your role, assigned locations and configuration determine what you can see and do.

### What feels different in 2.0

A search-first Home, compact navigation, contextual drawers and consistent table controls reduce repeated trips between lists and details.

### Three habits worth learning first

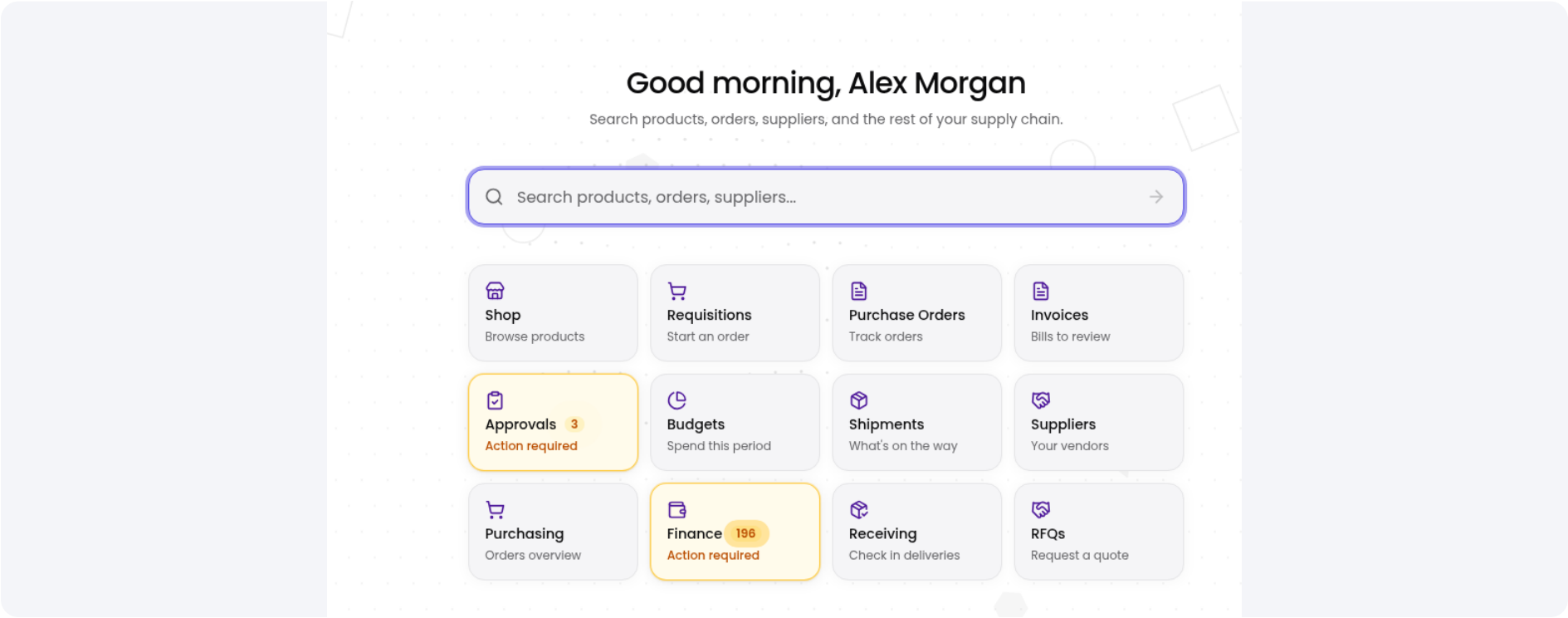
1. Search broadly from the header; filter precisely inside a table.
2. Open records in drawers so the working list stays underneath.
3. Filter and sort before using Previous / Next.

### Read this guide as a task guide

Features shown are from Demo. Screenshots use generic example identities and data; labels and availability can vary by permissions and configuration.

# Start from Home—not a maze of menus

Use shortcuts for frequent work and the sidebar for the rest of the platform.




DEMO SCREENSHOT • Generic example data • Controls shown may vary by role and configuration

### Get to work in one click

Choose a Home tile such as Shop, Requisitions, Invoices, Approvals or Shipments. Use the left sidebar to move between Organization, Supply Chain, Purchasing, Logistics, Reporting and Settings.

Hover over the sidebar for labels. Pin it open when you prefer persistent navigation.

### Keep your bearings

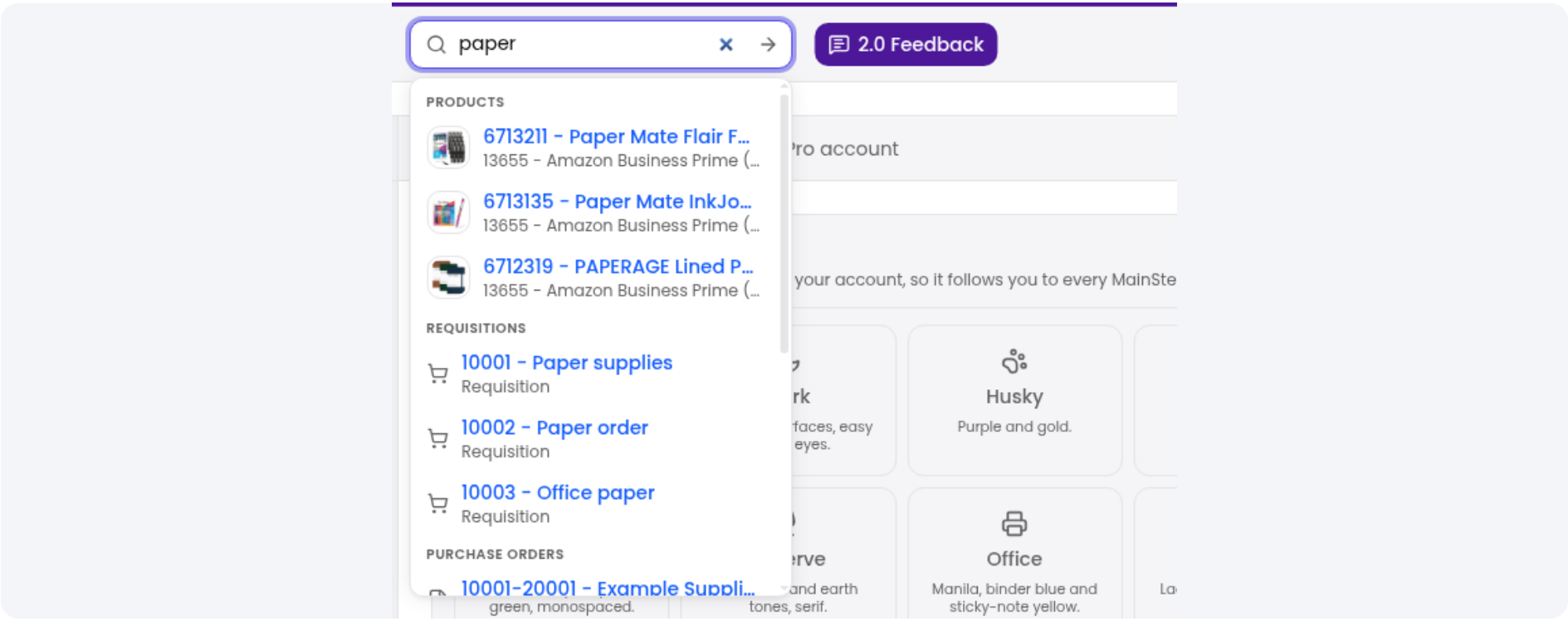
The navigation within a section exposes its related work—for example, Purchasing includes requisitions, purchase orders and invoices.

### Watch for Action required

Home can flag work such as approvals needing attention. Open the destination dashboard to review the actual records; the alert does not authorize an action by itself.

# Omni-search: one place to start looking

Find products and business records without first opening each separate dashboard.




DEMO SCREENSHOT • Generic example data • Controls shown may vary by role and configuration

**Search, then choose a result**

1. Type a useful name, keyword or identifier into the header search bar—or the large search field on Home.
2. Review the grouped suggestions, such as Products, Requisitions, Purchase Orders and Suppliers.
3. Select a match, or choose View all results for a broader results page.

**Search versus filter**

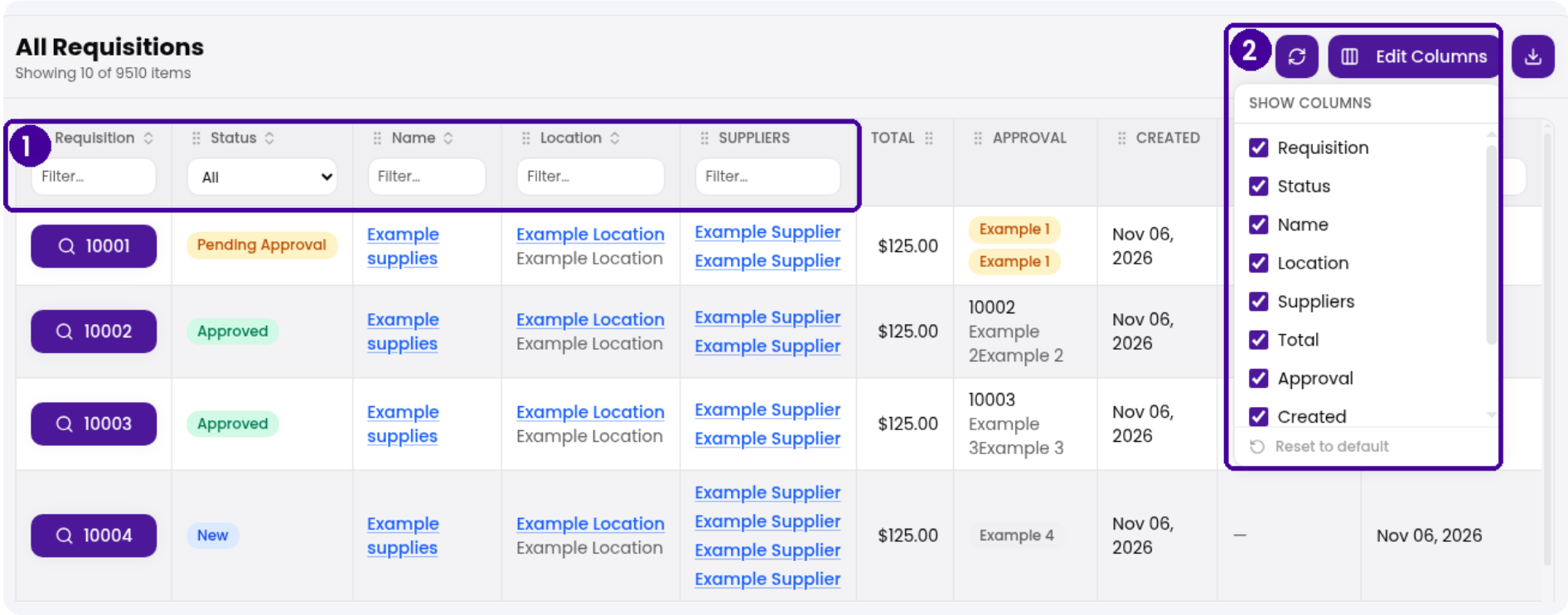
Omni-search discovers records across supported areas. A table filter narrows the list already in front of you. Try a different known identifier or the record's dashboard if a match is missing.

**Keyboard options**

Use Up / Down to move through suggestions, Enter to open and Esc to dismiss. Away from Home, Ctrl+M (Cmd+M on Mac) opens Spotlight search. Home uses its own large search field instead. Search results remain subject to your access.

# Make tables work for your task

Narrow the list, expose the columns you need and keep the screen focused.




1 Column filters 2 Edit Columns and visibility menu

### Build a useful view

Type into the filters beneath relevant column headings. Use dropdowns where offered, such as Status. Combine filters to narrow the result set, then use sortable headings to set a useful review order.

Choose Edit Columns to show or hide fields. Use column drag handles where available to arrange the view.

### Refresh and export deliberately

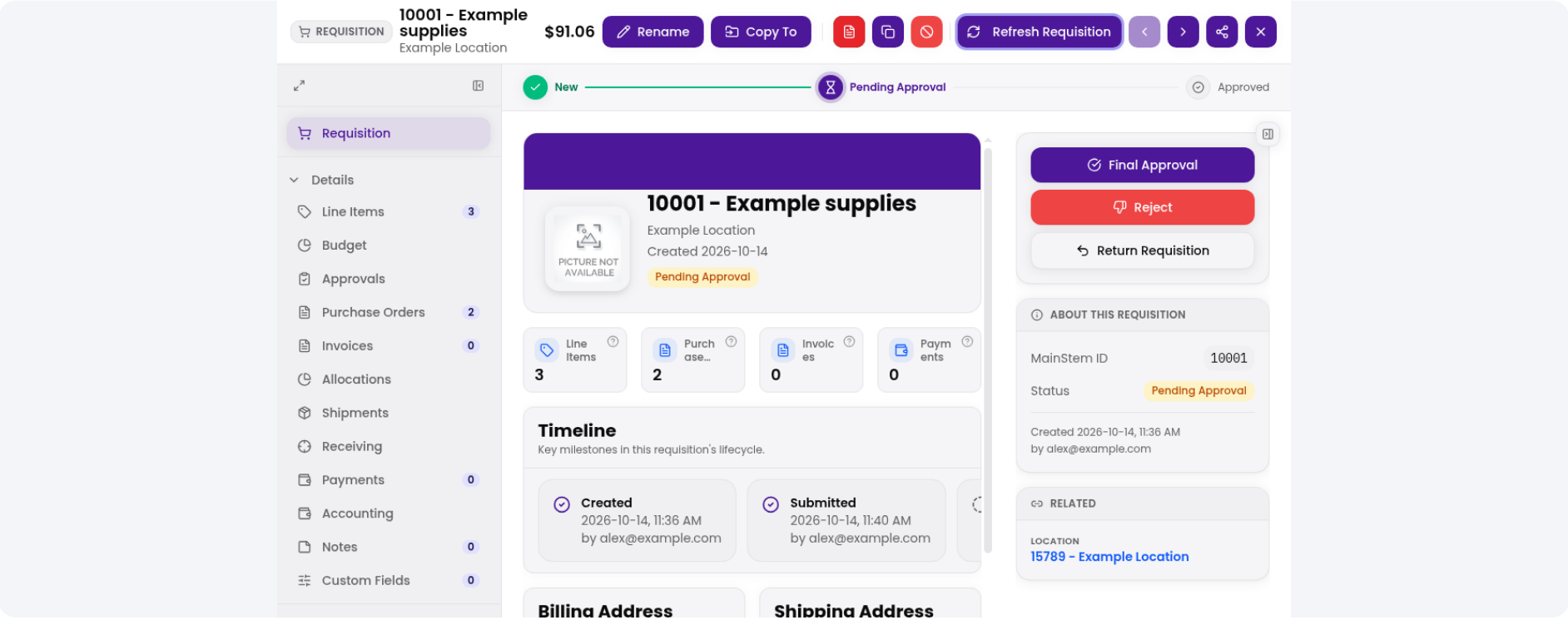
Refresh Data reloads records. Export as CSV covers the supported filtered/sorted set, not just the visible page. Check the file's scope before sharing it.

### What is remembered?

Supported column layouts persist in this browser; filters, sorting and paging normally last within the browser session. Page-controlled status cards are an exception. These preferences do not follow you to every device. Reset to default in Edit Columns resets the column layout, not every filter.

# Drawers: inspect details without losing your place

A record opens over your list, with its information and related work close at hand.




DEMO SCREENSHOT • Generic example data • Controls shown may vary by role and configuration

### Read the drawer in three zones

The header identifies the record and exposes available actions. The left navigation groups sections such as Line Items, Approvals, Invoices and Accounting. The main area shows the selected section; the right pane carries context and relevant actions.

Collapse side panels where available when you need more room.

### Move through related information

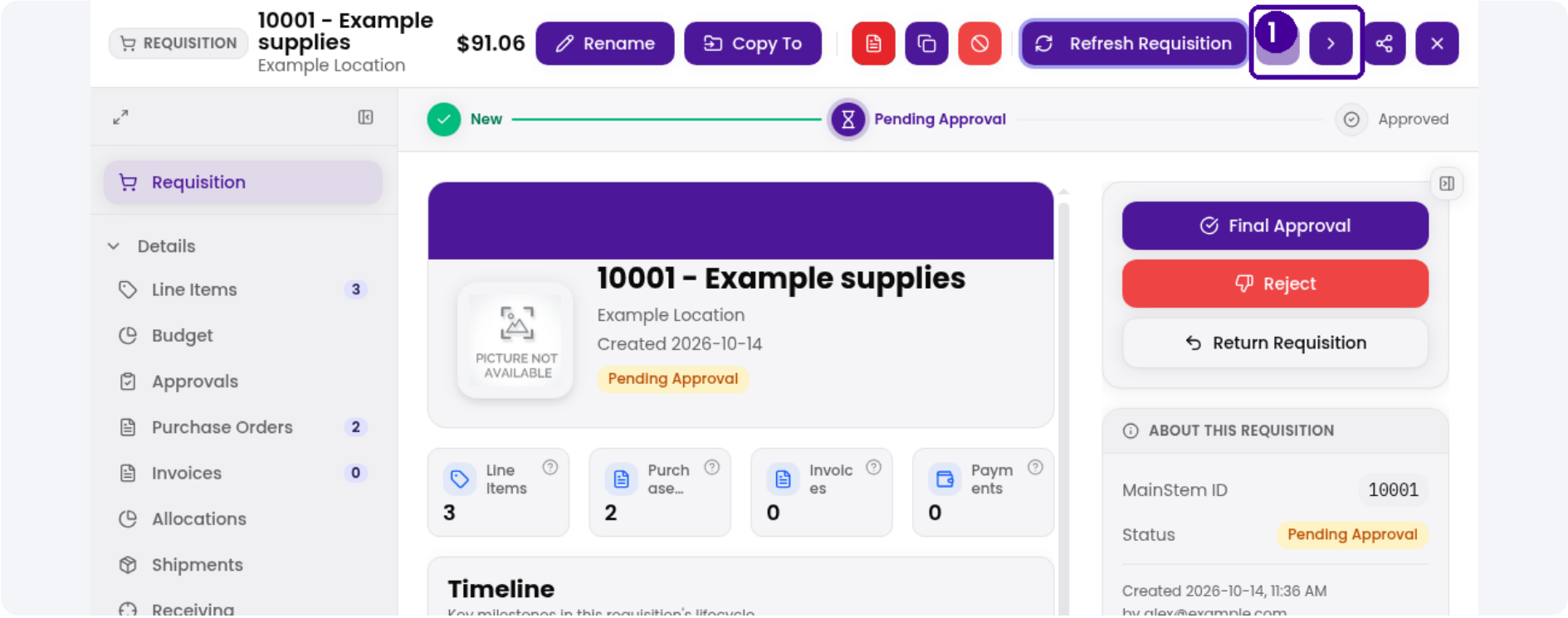
Use linked entities to inspect related records. When a nested drawer is opened, Back or Close may return one level in the drawer stack.

### Return to the list

Close the record drawer to resume the underlying work. Save or cancel edits explicitly before leaving; opening and closing a drawer is not a substitute for saving.

# Filter once. Review records in sequence.

Turn a filtered list into a focused review queue instead of repeatedly reopening rows.




1 Previous / Next controls in the drawer header

### A practical review loop

1. Apply the table filters you need—for example, Status = Pending Approval.
2. Sort the visible list into your review order.
3. Open the first relevant record.
4. Use Previous / Next in the drawer header to move through the registered list sequence.
5. Close the drawer to return to the filtered list.

### Know the boundaries

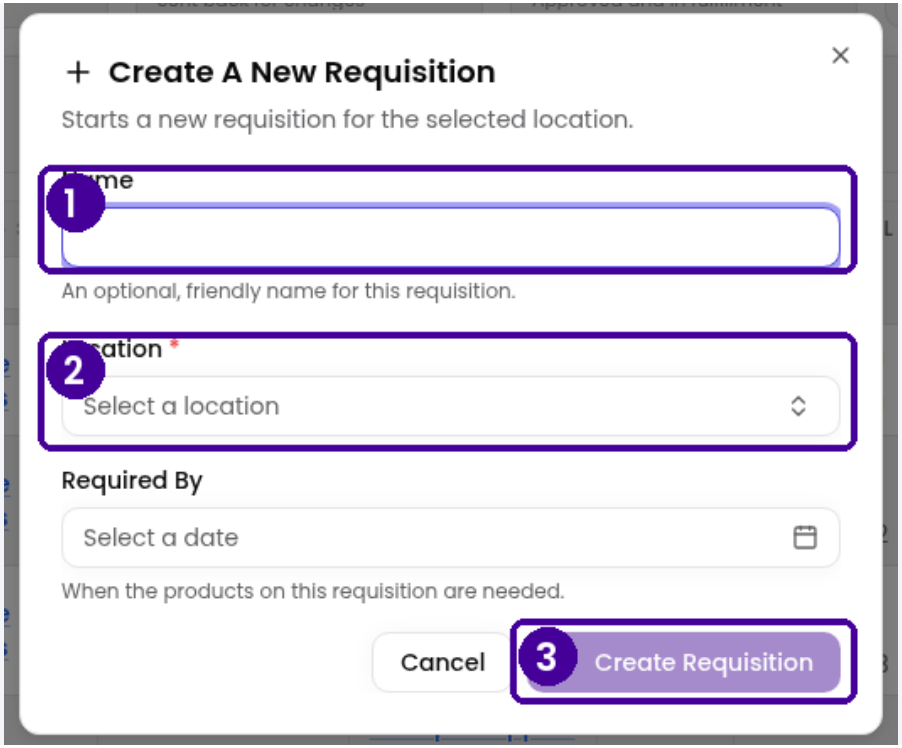
The buttons follow the originating list's registered order, not a global next-record search. In server-paged tables they stop at the loaded page boundary. A drawer opened from a direct link may have no list sequence.

### Why it helps

Use this pattern to review requisitions or coding checks without rebuilding your working set. Close the drawer, change pages and reopen to continue beyond a page boundary. Recheck the view after an edit changes list membership.

# Create a requisition with the right context

A compact setup step gets you into the requisition; creating it is not the same as submitting it.




1 Friendly name 2 Required location 3 Create action

**Start from Requisitions**
Choose New Requisition. Enter an optional friendly Name, select the required Location and set Required By when needed. Then choose Create Requisition.

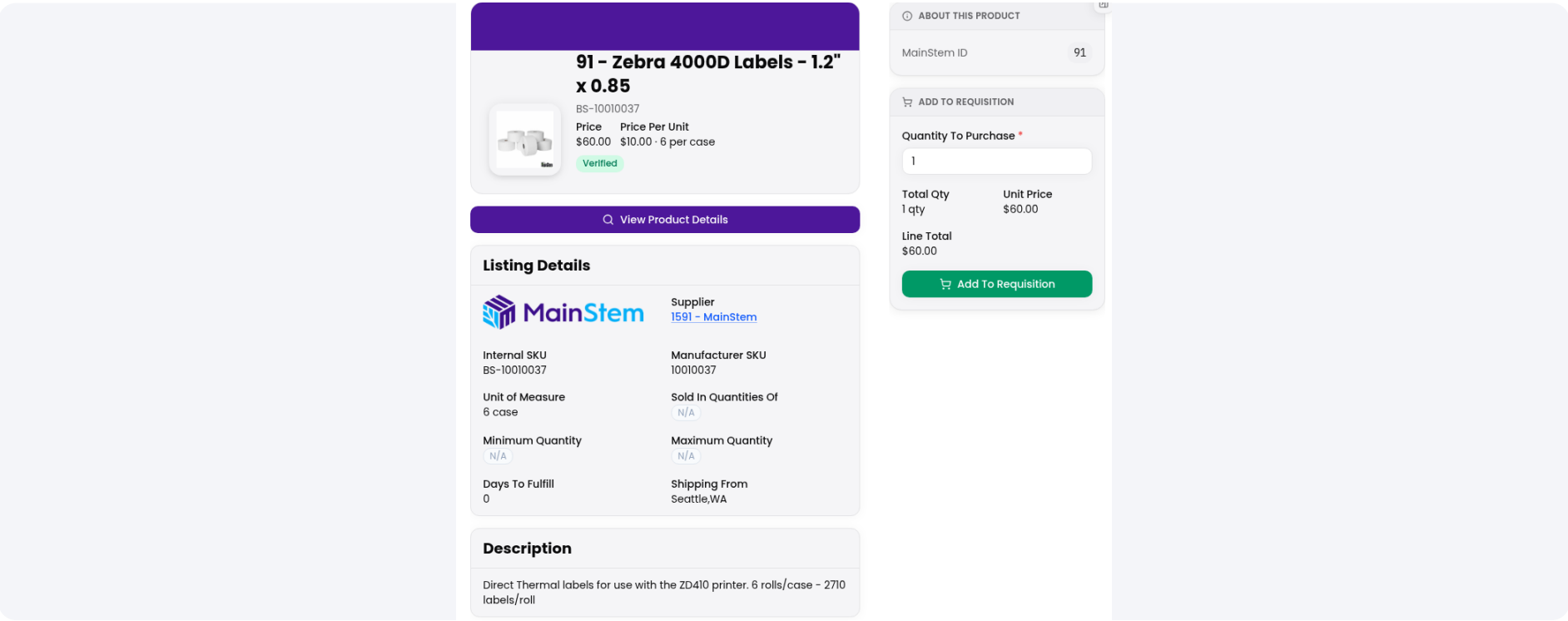
Choose a name that helps another buyer or approver understand the purpose, rather than repeating an internal number.

**Before you create**
Confirm the location—it anchors the purchasing context and available workflow. The location choices depend on your assignments and active locations. If the correct location is missing, ask an account administrator.

**Next steps**
Add products, check quantities and delivery details, and complete required accounting information. Follow the requisition's available submission or approval actions only after review.

# Shop and inspect products in context

Use marketplace search and product drawers to check the details before adding an item.




DEMO SCREENSHOT • Generic example data • Controls shown may vary by role and configuration

### Check more than the headline price

Open Shop from Home and search or browse an available marketplace. Open a product to review supplier identity, SKU, unit of measure, packaging, description and purchase controls.

Confirm Quantity To Purchase and check Total Qty, Unit Price and Line Total before choosing Add To Requisition.

### Keep the destination explicit

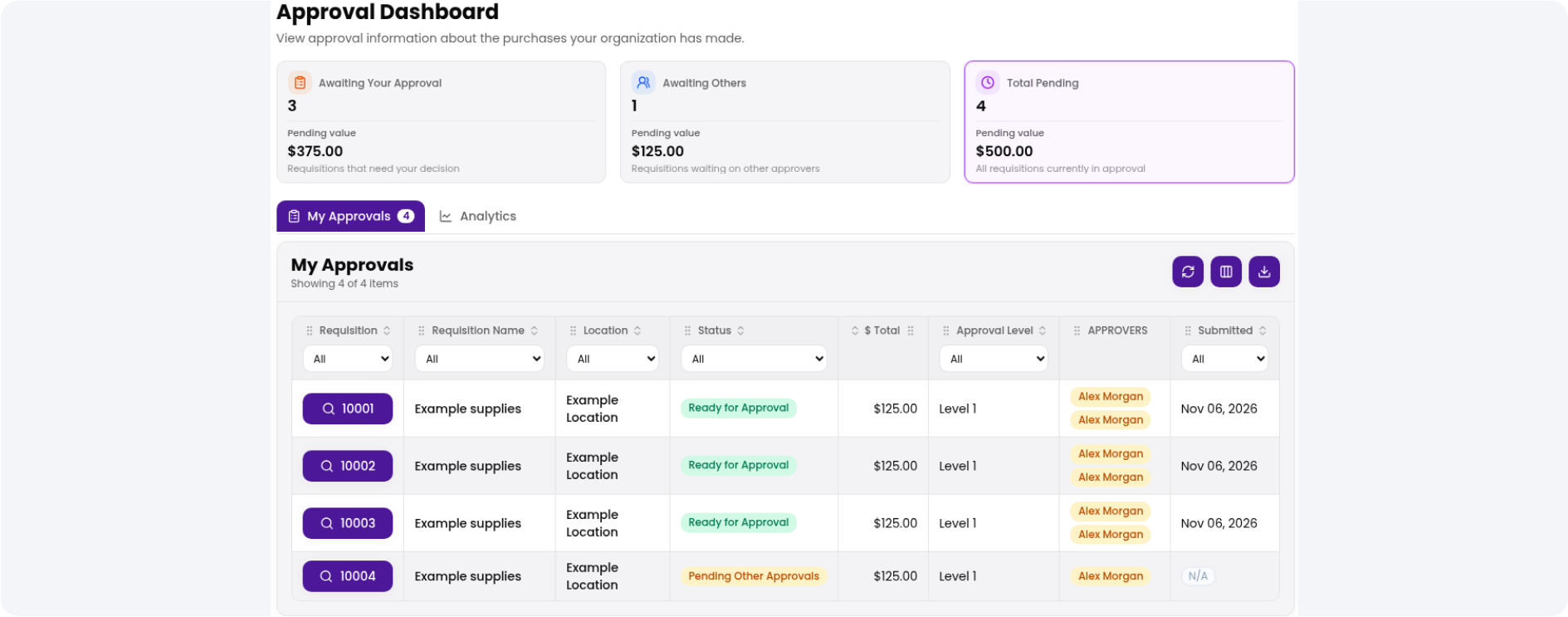
When prompted, choose the intended existing requisition or create a new one. When shopping from an existing requisition, confirm that its context is retained.

### Availability varies

Marketplace access, supplier offers and available requisitions depend on your account and permissions. Adding an item does not itself approve or release the requisition. Example prices shown are illustrative, not a quote.

# Approvals: separate ready work from waiting work

A single queue distinguishes items you can review now from items awaiting another approver.




DEMO SCREENSHOT • Generic example data • Controls shown may vary by role and configuration

### Read the status before acting

The Approval Dashboard summarizes Awaiting Your Approval, Awaiting Others and Total Pending. In My Approvals, Ready for Approval and Pending Other Approvals distinguish the two groups.

Use the summary cards or Status dropdown to focus the queue. Open the requisition number to review its details in context.

### Review before a decision

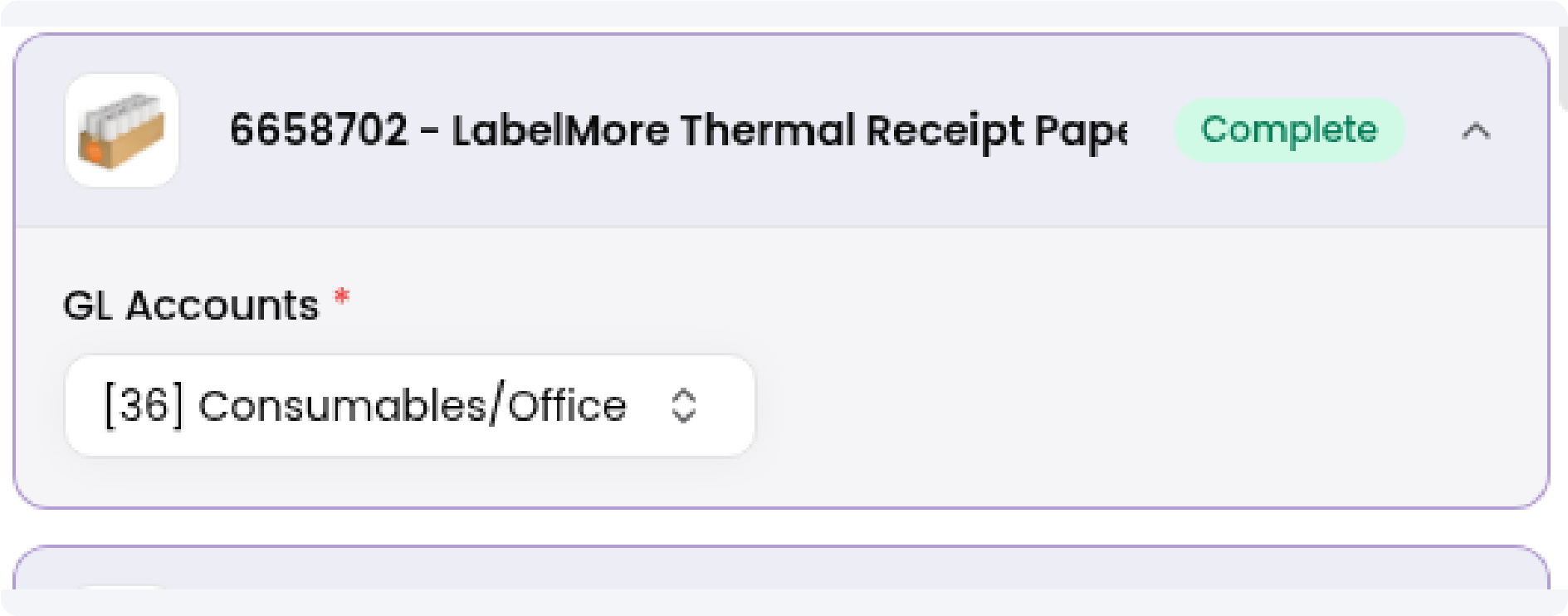
Check line items, totals, delivery information, required dimensions and the Approvals section. Use only the actions your role and the current workflow permit.

### Counts versus your view

Summary totals describe their full queue cohorts; table filters narrow what you see. Required Financial Dimensions can block progress until coding is complete. Approval and release are business actions—do not click them merely to explore.

# Financial dimensions: complete the coding where you work

Use Accounting on the requisition to see which line items need attention.




DEMO SCREENSHOT • Generic example data • Controls shown may vary by role and configuration

**Understand the terminology**
GL Accounts can be configured as a financial dimension. Other dimensions may represent a department, location or another accounting classification. The exact labels and allowed values are defined by your organization—not by this guide.

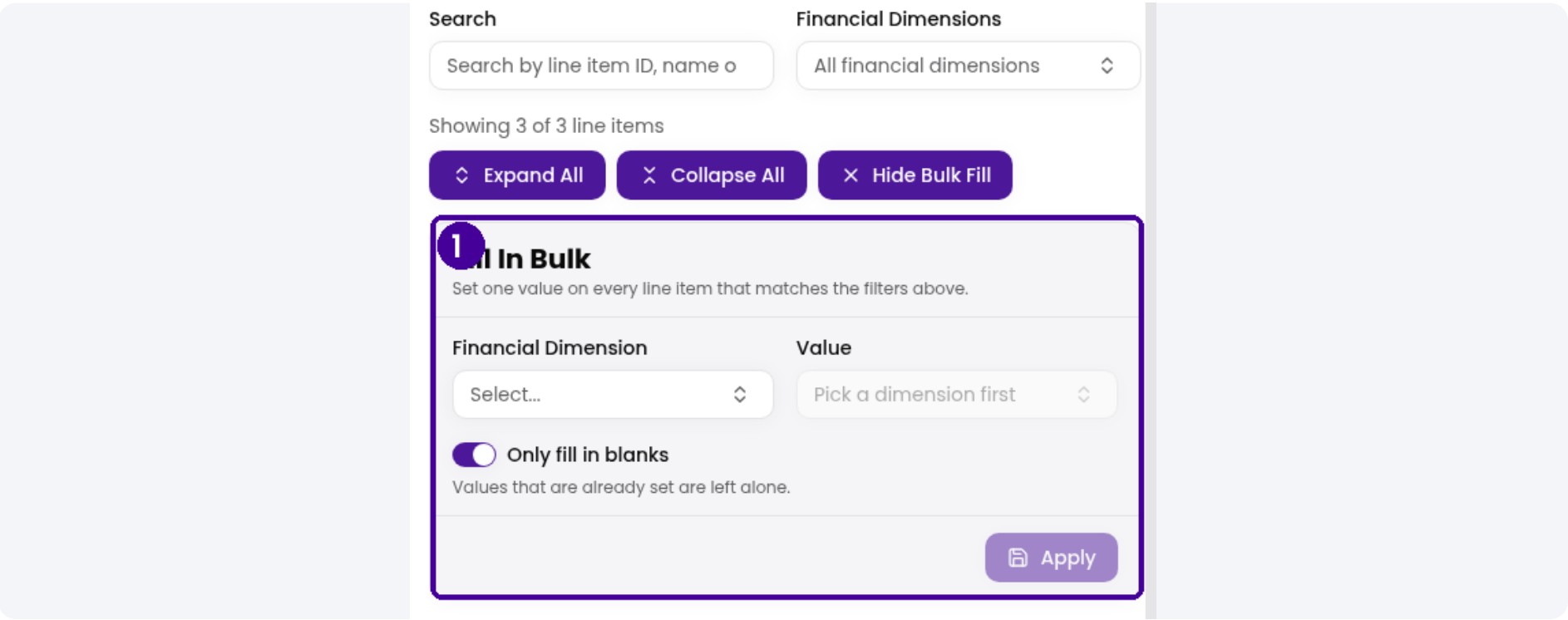
Open a requisition, choose Accounting and use Needs Attention, Incomplete, Complete or All to focus the line items.

**Review and assign carefully**
Use Search and Financial Dimensions to narrow the items. Expand a record—or choose Expand All—to inspect its fields. Select the approved value and check the save feedback. An asterisk marks a required field.

**Important: values carry forward**
Requisition Accounting saves these assignments on the product or supplier for the location, so future requisitions reuse them. It is not merely a one-time annotation on this requisition. Ask your accounting owner if the correct value is unclear.

# Fill financial dimensions in bulk—without guesswork

Apply a shared value to the matching line-item set, with a safeguard for existing coding.




1 Dimension, value, existing-value safeguard and Apply

**Use the filters first**

1. Open Accounting and narrow the records with its filters.
2. Choose Fill In Bulk.
3. Select Financial Dimension and Value.
4. Review Only fill in blanks.
5. Choose Apply To… and inspect the confirmation's target count and value before confirming.

The button initially reads Apply; selecting a value reveals the matching target count.

**Protect existing coding**

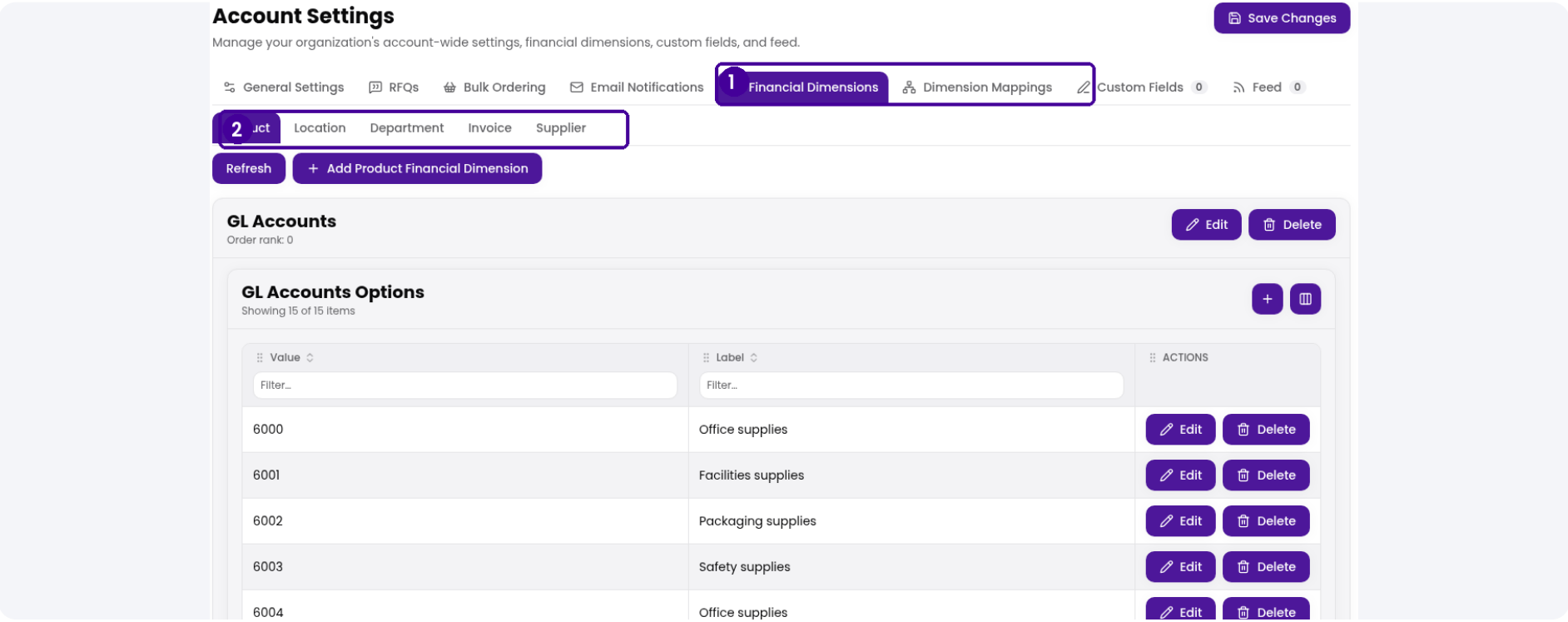
Only fill in blanks leaves existing values alone. Turning it off can replace values across the matching set—not just expanded cards. Different lines can legitimately need different GL values.

**This affects future requisitions**

Assignments are saved on the product or supplier for the location and reused later. After applying, inspect the result and affected records. Do not use bulk fill merely to clear warnings; use it only when the same approved value belongs on every target.

# Configure the choices—not just the transaction

Financial-dimension definitions, mappings and document coding are related but different tasks.




1 Definitions and mappings 2 Entity-type tabs

### Maintain dimensions and options

With the required access, open Settings > Account > Financial Dimensions. Select the relevant entity type: Product, Location, Department, Invoice or Supplier. Add or edit the dimension definition, then maintain its allowed options using Value and Label.

Use your accounting team's approved values and naming conventions.

### Assignments and save boundaries

Dimension Mappings assigns entity values; pending changes use Save (n). Requisition Accounting updates product/supplier assignments for a location.

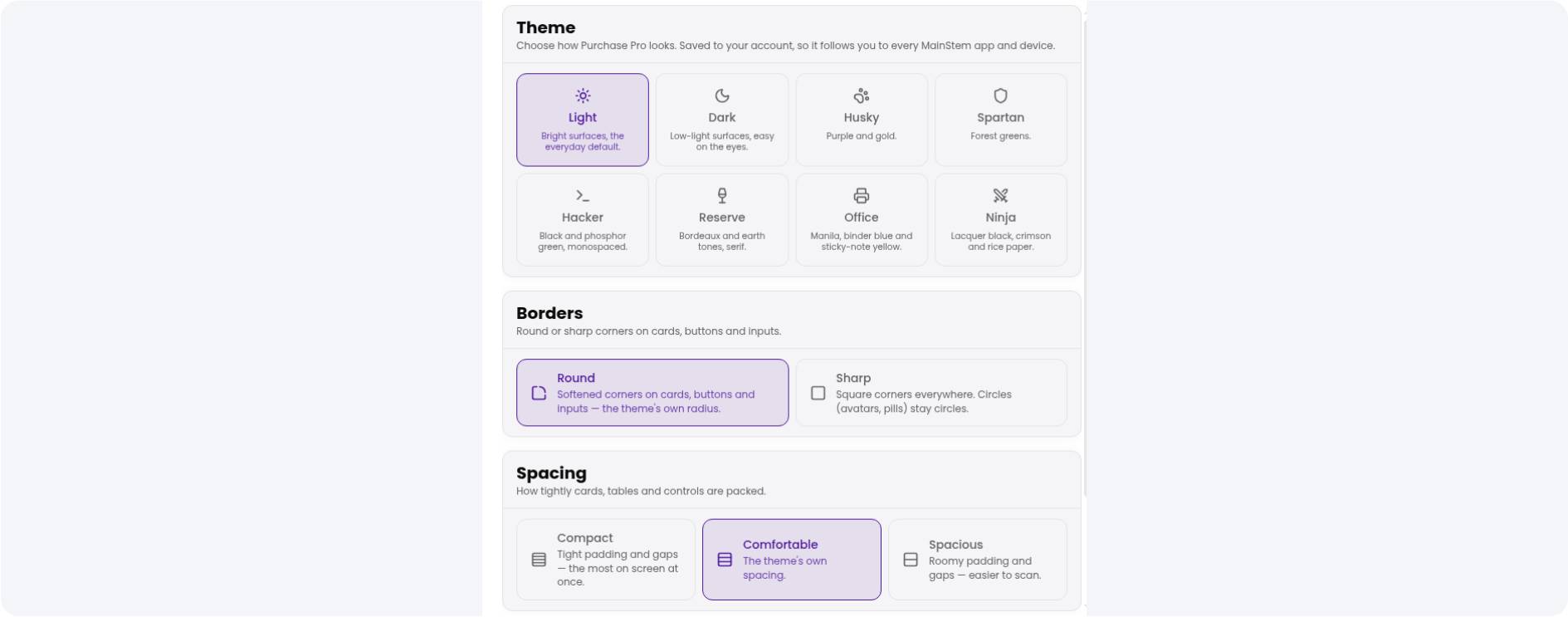
### Invoice-level coding

Open the invoice > Accounting > Financial Dimensions > Edit. Choose values, then Save Changes and verify the result.

Definitions and options have their own form saves. These actions do not run an external accounting sync.

# Set your profile and make the workspace yours

Personal display preferences are separate from your organization's accounting settings.




DEMO SCREENSHOT • Generic example data • Controls shown may vary by role and configuration

### Open My Profile

Use your name/avatar menu > My Profile. In Your Account, review your profile and update the display name with Save Name when needed. Use the available Locations, Catalogs, Permissions and Password sections to inspect or manage supported account information.

Changing a display name does not change your login username or access rights.

### Choose Appearance

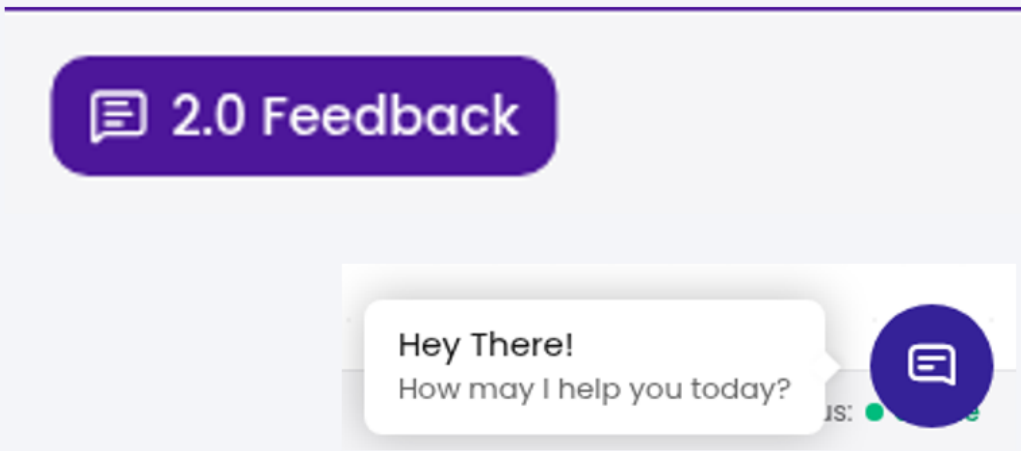
Select Light, Dark or another available theme. Choose Round / Sharp borders and Compact / Comfortable / Spacious spacing. Scroll to Font Size; drag to preview and release to save. There is no explicit System theme option.

### Where preferences live

Appearance is saved to your account and follows you across MainStem apps and devices. These controls save as you interact; they do not use Account Settings' Save Changes. Personal appearance does not change your access rights.

# Give feedback that is easy to act on

Tell us what you were trying to do—not only that something felt wrong.




DEMO SCREENSHOT • Generic example data • Controls shown may vary by role and configuration

**Use 2.0 Feedback in the header**
The button opens your email application addressed to feedback@mainstem.io with a subject based on your profile and the current date. Review the message, add details and send it yourself. Clicking the button alone does not submit feedback.

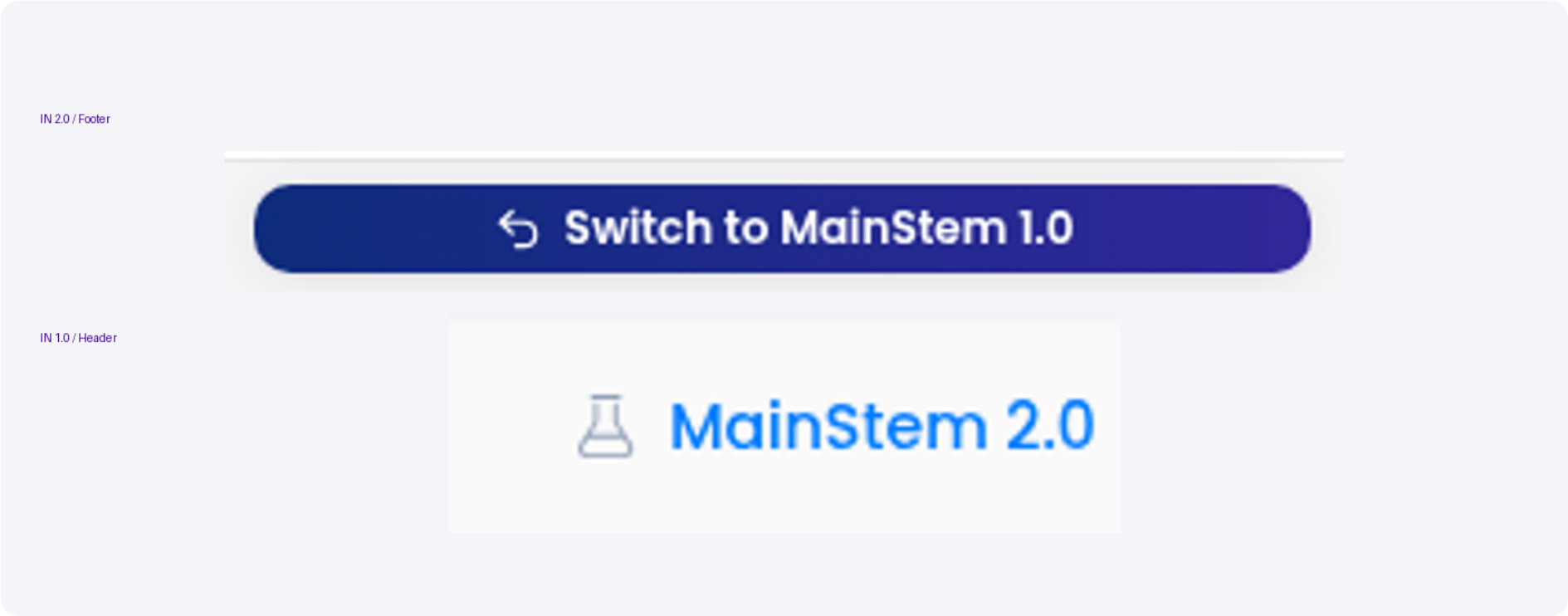
If no email application opens, email feedback@mainstem.io directly. The in-app support chat is another way to contact the team.

**A useful feedback checklist**
- Which screen and which task?
- What steps led to the issue?
- What did you expect, and what happened?
- Is it repeatable? Is there a workaround?
- Include a cropped screenshot and relevant record reference when appropriate.

Keep passwords, payment details and unnecessary personal or customer data out of screenshots. MainStem Phenom's Ask AI control is separate from sending feedback or contacting support.

# Move between 1.0 and 2.0 during the transition

Use the in-product switch—not a copied session link.




DEMO SCREENSHOT • Generic example data • Controls shown may vary by role and configuration

**From 2.0 to 1.0**
Use Switch to MainStem 1.0 at the bottom of the screen.

**From 1.0 to 2.0**
Use MainStem 2.0 in the top header. An onboarding message may also offer Launch MainStem 2.0.

These are interface switches for the same purchasing environment—not a copy or migration of the record.

**Switch safely**
Save or cancel edits first. Do not assume unsaved form input, filters, open drawers or your exact position transfer between interfaces. Confirm the record and its status before repeating an action after switching.

**Transition availability**
The switch is available while MainStem supports both versions. Do not bookmark or share a switch URL containing a session token. Use your normal sign-in or the in-product controls.

# More ways to cut repeat work

A few supporting tools help you source, organize and share without rebuilding the same context.

**Quick RFQ**
When your role allows it, use Quick RFQ in the header to start a guided quote request. Work through the delivery address, items, timing, sourcing options and review steps. Review the final request before submitting; starting the flow does not send it.

**Catalogs**
Use Organization > Catalogs to organize repeat-purchase products. In supported MainStem product drawers, Catalogs lets authorized users add the item to a catalog. Catalog visibility and product access depend on configuration.

**Check Inbox**
The header's notification bell is your Inbox. Open it to review messages; a count alone is not a complete work queue.

**Share the record—not your session**
The drawer's Share control copies the record's normal full-page link. Send that link to a colleague who already has access; sharing it does not grant permission. Never share a sign-in or version-switch URL that contains a session token.

**Keep the app current**
If App updated appears, save or cancel edits before refreshing. Unsaved input can be lost during a reload.

**Ask AI is separate from search and support**
Use Phenom / Ask AI or Ctrl+/ (Cmd+/ on Mac) to open MainStem Phenom. It does not replace the record's official status, your approval authority or the feedback email workflow.

# Your everyday 2.0 quick reference

A short checklist for buyers, approvers, accounting users and account administrators.

**Buyer**
Home > Requisitions > New Requisition. Confirm location, add items and review delivery details and required coding before submission.

**Approver**
Home > Approvals. Focus Ready for Approval, open the record, review the details and follow the available decision workflow.

**Accounting user**
Requisition > Accounting. Filter the exception set, correct dimension values and use bulk fill only for genuinely shared coding.

**Account administrator**
Settings > Account > Financial Dimensions / Dimension Mappings. Maintain approved choices and entity assignments; distinguish these from document-level coding.

**Everyone**
Use omni-search to find; table filters to focus; drawers to stay in context; Previous / Next to review a sequence. Use My Profile > Appearance to tailor the view.

**Need help?**
Use in-app support or feedback@mainstem.io. If an action or location is missing, check with your account administrator before assuming the feature is unavailable.