**Account Manager Role**

The AM can edit the order, add notes, upload attachments, reroute approval to another AM, and reroute the order to a specific Purchaser (which is not recommended). They can also cancel the order (comment required), deny the order (comment required), or approve the order.

If an account was not designated by the Requestor, then there will be a warning in a red box at the top of the order form that states at least one account must be assigned.

- Click on the “Please edit this order” in blue, to assign the account. You cannot approve the order until you assign an account.
- In the section titled ‘Line Item and Account Modification’, click on the blue ‘Edit Line Items and Accounts’.
- Click okay.
- Then enter the account from the pull-down menu in the Order Details section under ‘Select an Account’.
- If you don’t see the account you want to use, then click on the blue magnifying glass next to Account, and do a search for your account and select it.
- Save the order.

*Important Note: If you search for an account using the blue magnifying glass, the order will then route to the designated account manager that’s in KFS and will not be seen by any other AM in the workgroup or any account delegate set up in KFS. If you select the account from the drop-down menu then it will route to the workgroup AMs, rather than what’s in KFS. If a requestor or the approver selects an account by using the blue magnifying glass, the same thing will happen. The order will go directly to the KFS Account Manager and nobody else.*