STAPLES **Link.com**®

Quick guide **for supervisors**

StaplesLink.com®

Supervisors can have the following responsibilities:

• **Manage Users:** Add and delete users, modify user information.

• **Custom Messages:** Update various messages for StaplesLink.com users.

• **Reports:** Access your company's online user and spending reports.

• **Approve Orders:** Some organizations require that some or all orders be approved by a Supervisor before they are submitted.

• **Create Shared Shopping Lists:** Create and update shopping lists to be accessed by all of your StaplesLink.com users.

Manage Users

Manage Users allows you to add and delete users and modify user information.

1. Click **Administration** on the **Navigation Bar** and then select **Manage Users.** Or, from the **Home Page**, select **Manage Users** from the **Administration Options**.

2. Click on the appropriate level of user you wish to create:

   • **Associate** – Creates orders that may require approval by a Supervisor.

   • **Supervisor** – Creates and submits orders, is the first level of approval for Associate orders (if applicable), and has access to additional StaplesLink.com functionality.

You will be prompted to enter required information to complete the new user profile.

Frequently, you will find it easier to copy an existing user and modify that information. To save you time, copying a user will prompt you to enter only information specific to the new user being created.

You also have an option to send an immediate email notification to a new user identifying all their login credentials.

Custom Messages

Custom Messages allow Supervisors to post announcements and information to your StaplesLink.com users. Follow these steps to edit Custom Messages:

1. Click **Administration** on the **Navigation Bar** and select **Custom Messages**. Or, from the **Home Page,** select **Custom Messages** from the **Administration Options**.

2. Select the **Bill To** that you are customizing information for.

3. At this point you may customize the Bulletin Board Messages, Purchase Information Messages, Email Messages, or Page Display Settings**.**

Reports

Click **Administration** on the **Navigation Bar** and then select **Reports**. Or, from the **Home Page**, select **Reports** from the **Administration Options**.

User Reports: Allows you to view your company's StaplesLink.com users as they relate to specific Supervisors, User Types, Bill To, Ship To, and Budget Centers.

Spending Reports: Allows you to view a summary of your company's StaplesLink.com purchases by Budget Center, Bill To, Ship To, and User for up to 24 months.

Order Approvals

To approve, decline or modify orders, follow these steps:

1. Click **Administration** on the **Navigation Bar** and then select **Approve Orders**. Or, from the **Home Page**, select **Approve Orders** from the **Administration Options**.

2. Approve, decline or modify orders using one of the following methods:
   • **Accept all orders** by clicking **All** (at the top of the **Accept Column**). StaplesLink.com puts a check mark in each **Accept Box**.
   • **Accept** or **decline orders individually** by clicking the appropriate check box.
   • **View or modify orders** by clicking on **Review**. This allows you to make any necessary adjustments and submit the order.

3. Click **Submit** to complete the approval/decline/modify process. A summary of accepted orders (and submitted to Staples) or declined orders is displayed.

Create Shared Shopping Lists

Shared Shopping Lists are custom lists that are available to all of your users. The process of creating a shared list is similar to creating a personal list:

1. From the **Shopping List** section of the home page, select **Create New List** from the drop-down box. Or, click **Go** and then click the **Create New List Button** on the **Shopping List Page**.

2. Assign a list name and choose **Shared** as the access level. You can also add a description of the items in the **Shared Shopping List**.

3. Add one item at a time or choose the **Enter Several Items Option** to add multiple items at once to the list. Once you have all of the items in your list, click **Save List**.

4. You can also create a new **Shopping List** while viewing your order details. Simply display your order by clicking the **View Order/Submit Option**. At the bottom of your order screen, create a new **Shopping List** by assigning a list name and clicking **Create New List**. Identify the access level, description and click **Save List**.

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