

Customer Support Hotline: 1-800-633-6080

### STAPLES CONTRACT DIVISION

## 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.

- 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:

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

Home Office Suppl	ies.) Technology) Furniture) Featured Items) Special Order
Resource Center Approve Orders Manage Users	Administration Order Hanagement Customer Service Edit My Profile Custom Messages Reports Change Password
Manage Users	
Create a New User	
Create a new Supervisor     A user who can approve orders and acce     Create a new Associate     A user who can place orders and change	ss selected administrative functions and reports. their password.
Edit User Profiles	Search for a User Profile
<ul> <li>Select any user from the list below, then click an action.</li> <li>Two users found</li> </ul>	Enter as much information as you know about a particular user then click 'Go' to search. Search results will display in the dialog box to the left
Gentol Carol Summers, Ally Dal	By Name or ID: Last Name
	Enter Name or ID:
	By User Type: Any  By User's Supervisor/Administrator:
	Any
	60
Home   Office Suppl	lias   Tachnologu   Furniture   Fastured Items   Special Order utratton   Order Management   Customer Service   Help   Locauts acurty Delices   Copyright 1999 - 2003 Steples, Inc. All Publer reserved.

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### 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.
- 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**.
- 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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