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Buyer Functions

Buyer Responsibilities:

Create and submit orders for approval and manage personal profile and preferences.

Approver Functions

Order Approver Responsibilities:

All of the Buyer functions as well as the following:

Review, approve and/or reject orders pending approval.

Administrator Functions

Administrator Responsibilities:

All of the Buyer and Order Approver functions as well as the following:

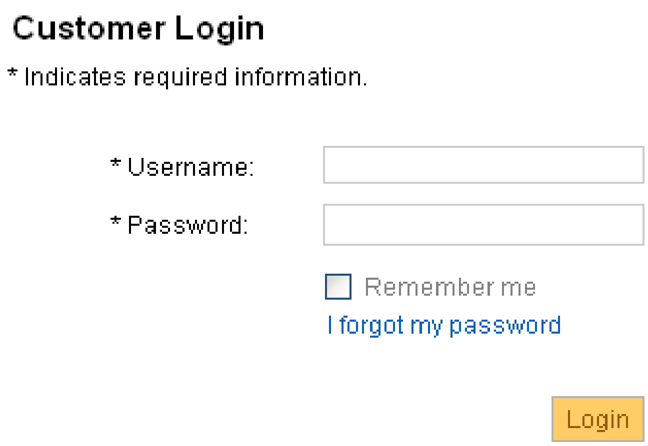
Manage users profiles, ship-to locations, spending limits, and view online account reports.

Note: Buyers only have access to Buyer Functions. Order Approvers have access to Buyer and Approver Functions. Administrators have access for all functions.

Login Process

The Staples Preferred Customer Program Web Site address is www.staplespreferred.ca.

Once you log in to the Staples Preferred Web Site, enter your username and password.



If you do not have a username or password, please contact your Company's Account Administrator.

Remember Me

If you wish for the system to remember your login information, click on the box below password entitled "**Remember me.**"

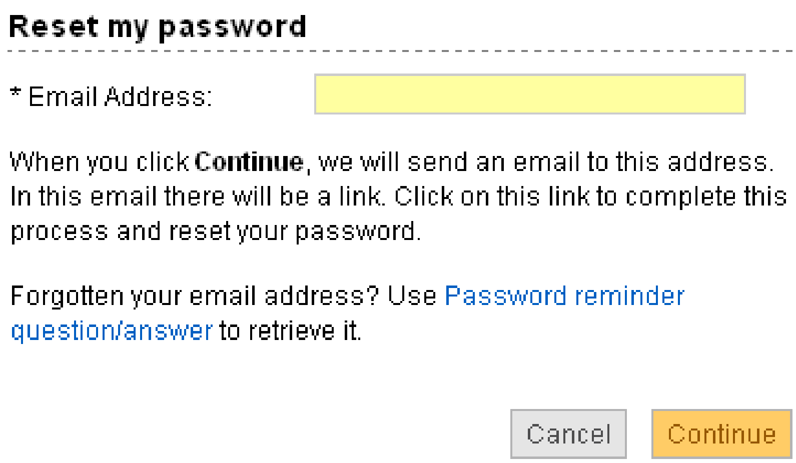
By checking this box, every time you access the Staples Preferred site on the computer you are using, the system will partially authenticate you and you do not need to enter your login information (i.e. username and password) to browse the site. Partial authentication does not expire as long as you do not uncheck the "Remember me" box and logout or clear you Web cookies.

Partial authentication does not apply for order placement. Once you place an order, you will need to log in to the web site using your username and password. This process adds security to the site.

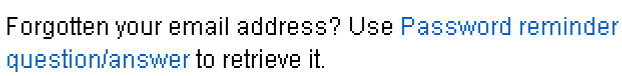
Reset Password

If you have forgot your password and need to reset it, click on the link “I forgot my password.”

You will open up the **Password Assistance** page**.** Enter your email address and click “Continue.” An email will be sent to you that will provide a link to reset your password.



In the case that you have forgotten your registered email address, please click on the “Password reminder question/answer” link.



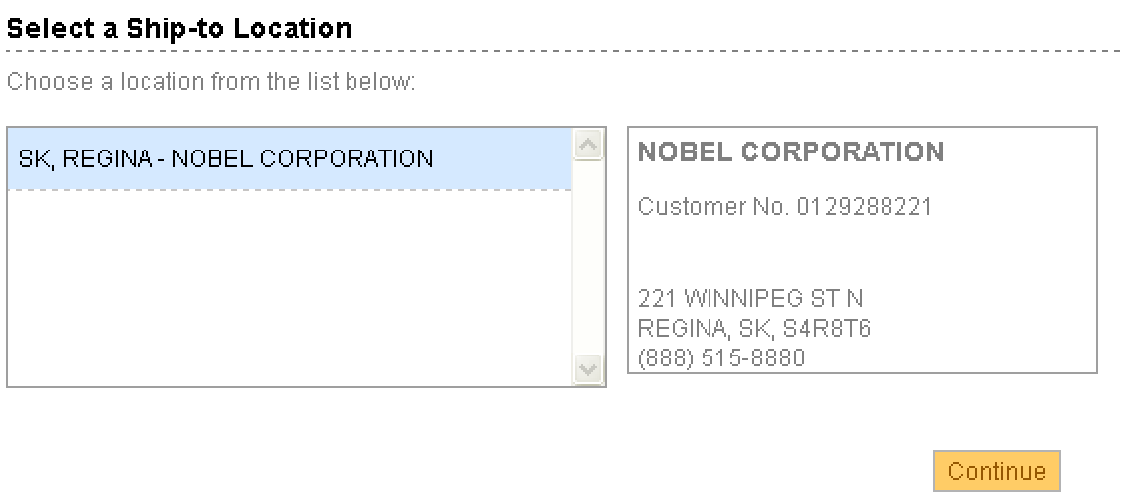
You will need to first enter your username and click “Continue.”

Your username and registered email address will appear. You will need to enter and reenter a new password and answer a security question.

Authorize Ship-to Location

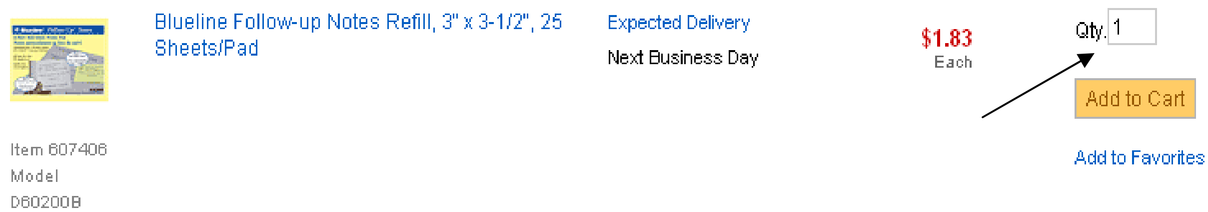
If you are authorized to buy from more than one Ship-to Location, you will be directed to the **Select a Ship-to Location** page upon login to the Staples Preferred site. To select a Ship-to Location, select the location from your list and click “Continue” at the bottom of the page.

Note: If you are authorized to only one ship-to location, the system will bypass this page and bring you directly to the Staples Preferred home page.



Add Item to Shopping Cart

Select the item you wish to purchase and enter the quantity you wish to buy.



Click “Add to Cart.”

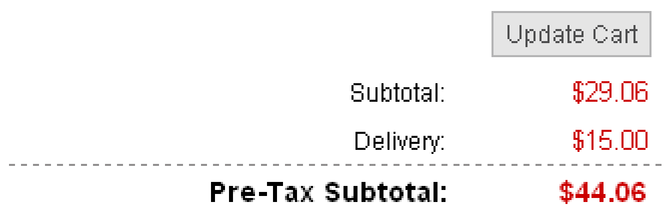
A message will appear at the top of your Shopping Cart confirming that the item(s) has been added to your Shopping Cart.

Continue shopping or proceed to checkout.

Delete Item from Shopping Cart

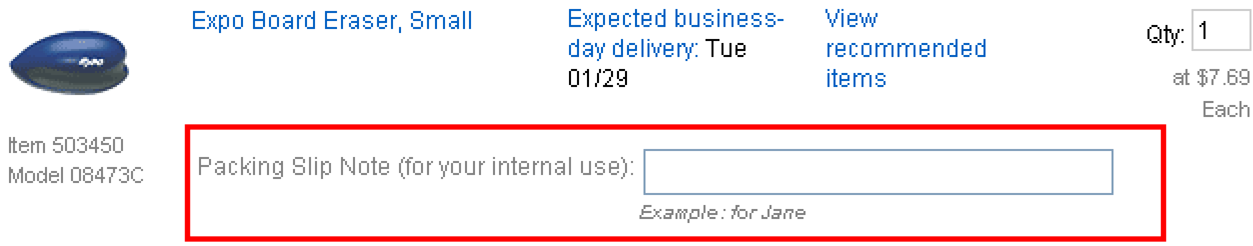
Under the item’s price, click “Remove Item.”

Your cart will update automatically and remove the item. You can also click the “Update Cart” button located above the subtotal price to refresh your cart and pricing.

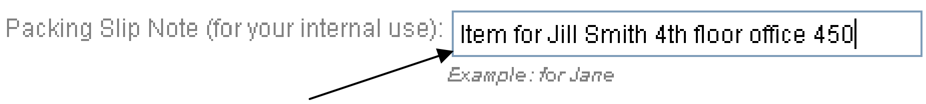


Add Packing Slip Note

From your Shopping Cart, you can add Packing Slip Notes to individual items on your order. Click in the box next to "Packing Slip Note."



Type your note. (Please be aware that the Packing Slip Note section is limited to 40 characters including spaces).

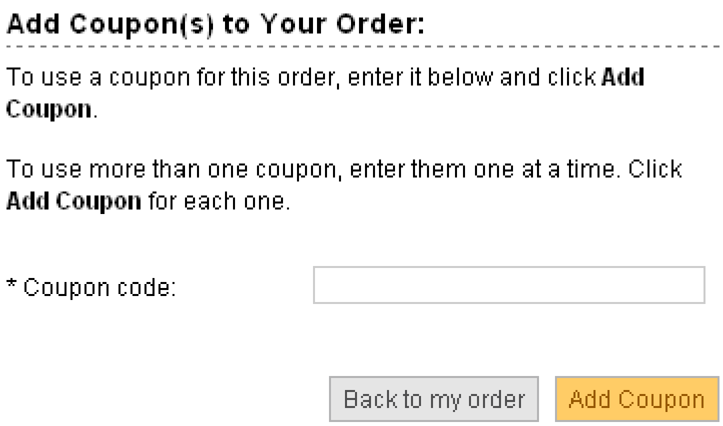


You have successfully added a Packing Slip Note to the item. This note will print on the package slip that received when the order is delivered.

Add/Edit Coupons

At the bottom of the **Shopping Cart** page is a button “Add/Edit Coupon.” Click on this button.

This will bring you to the **Staples Preferred Coupon** page. You can enter your coupon code (5- or 16-digit codes).



You will need to enter one coupon at a time. This page also includes information about coupon usage under the “Important Restrictions” heading. Once you have entered all coupons, click “Back to My Order.”

Confirm Payment Information

The first step of the checkout process is to **Confirm Payment Information**. You have two options:

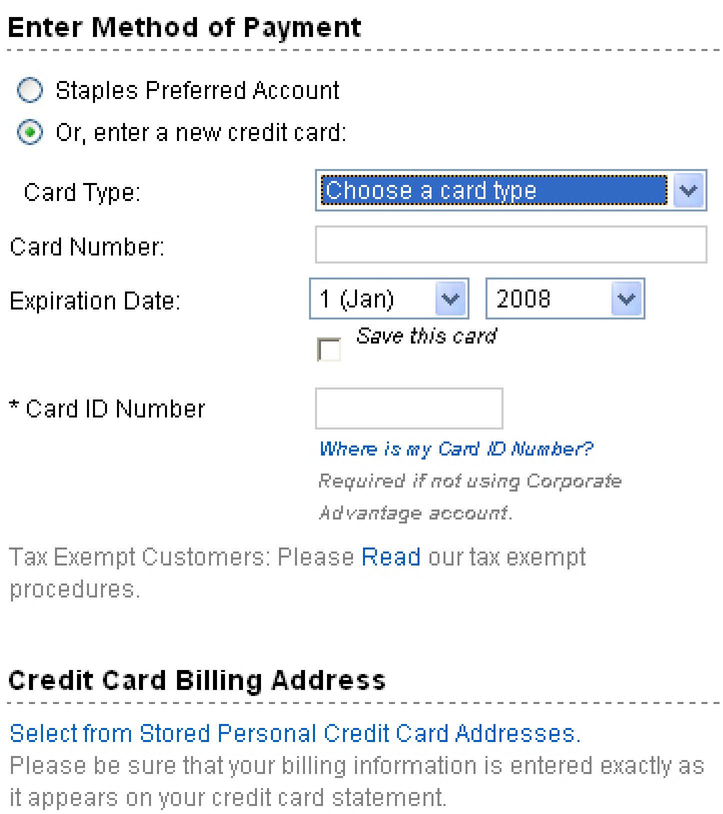
- Using your Staples Preferred Account
- Paying with a credit card

Staples Preferred Account

Make sure you selected "Staples Preferred Account" and click "Continue" at the bottom of the page. *Note: The system will default to using this method of payment.*

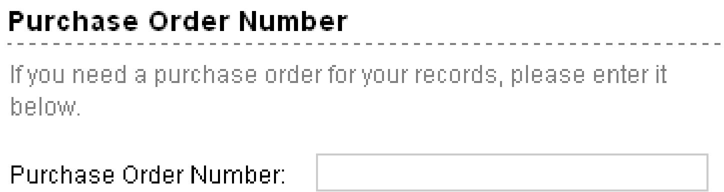
Credit Card

You can either select from a credit card that you store on file or enter new credit card information. If you are entering new information, make sure to include both the card information and billing address information. Once all of the information is complete, click "Continue" at the bottom of the page.



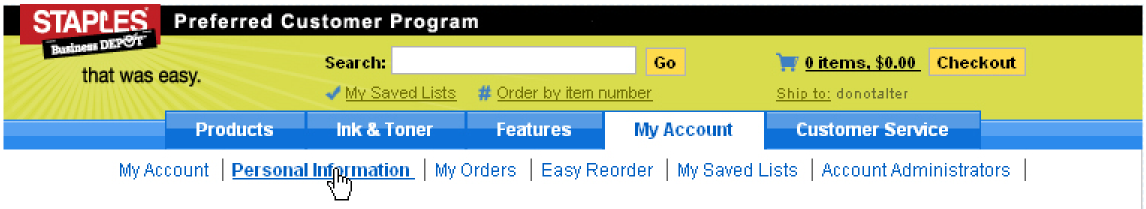
Adding Purchase Order Number

To include a Purchase Order Number to your order, enter the number in the box next to “Purchase Order Number” and click “Continue” at the bottom of the page.

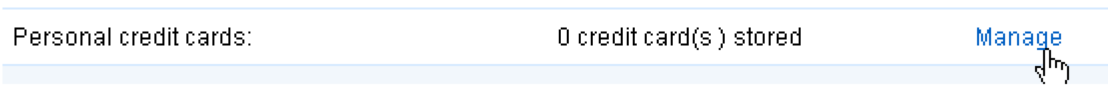


Store Credit Card Information

From the **My Account Tab**, click “Personal Information.”

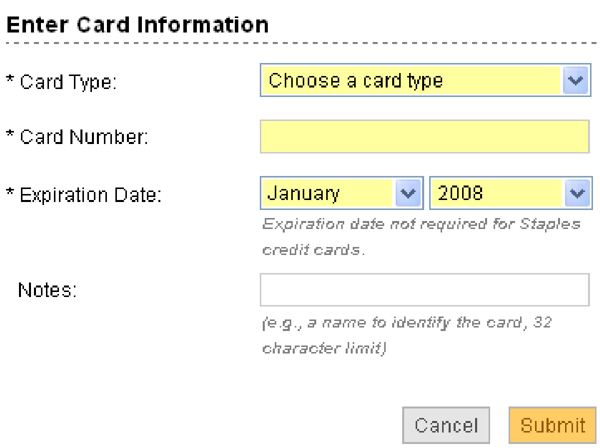


Next to **Personal credit cards**, click “Manage.”

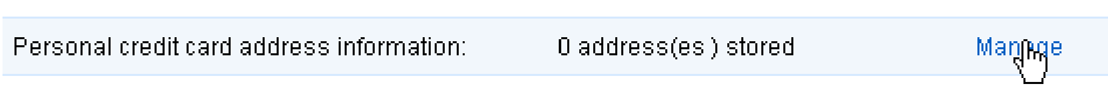


Next, click on the button “Add New Card.”

Add your credit card information and click “Submit.”

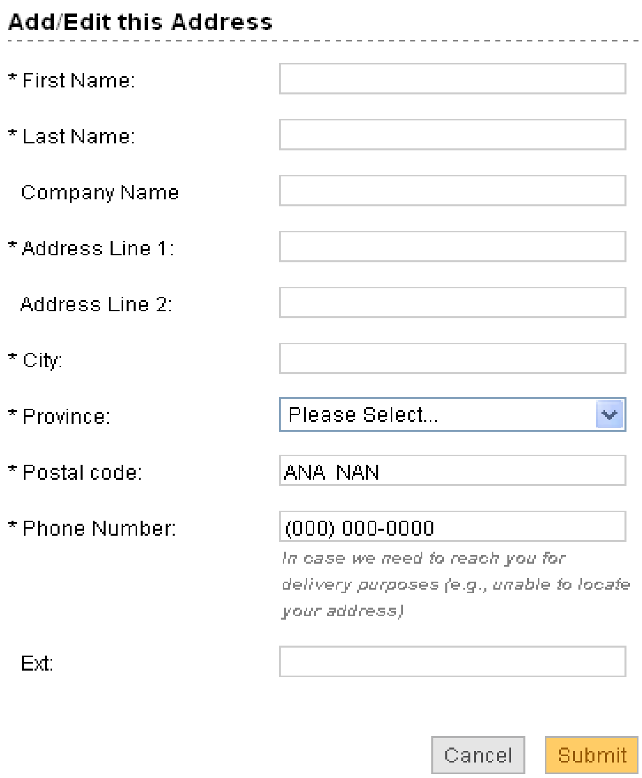


Return to **My Account- Personal Information** and in the “Personal Credit Card Address Information” section click “Manage.”



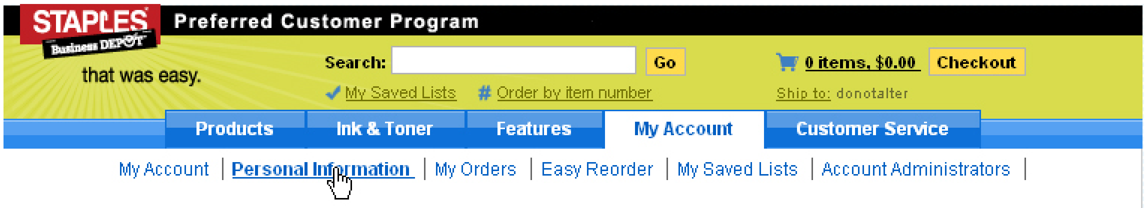
Click on the button, “Add Address.”

Add your credit card billing address (address where credit card statement is mailed) information for verification and click “Submit” when finished.

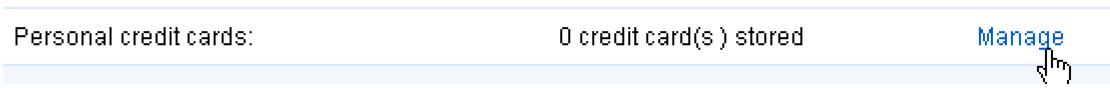


Edit/Delete Store Credit Card Information

From the **My Account** tab, click “Personal Information.”



Next to **Personal credit cards**, click “Manage.”



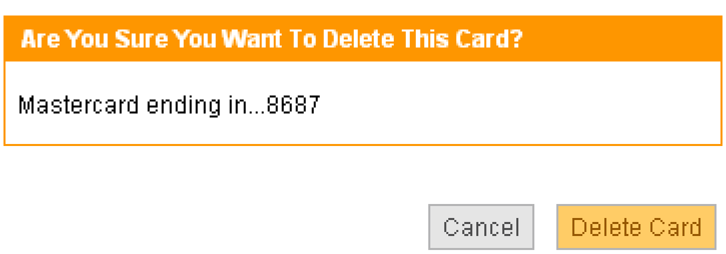
Under your card information, click on the “Edit Card” button.

Edit your credit card information and click “Submit.”

<u>Delete Card Information</u>

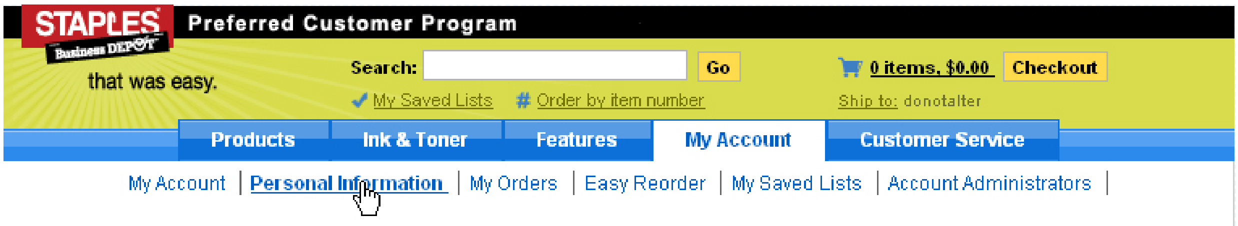
If you are deleting the card, click on the “Delete Card” button.

You will receive a confirmation message and then, click on the “Delete Card” button again. This card will be deleted from the system.

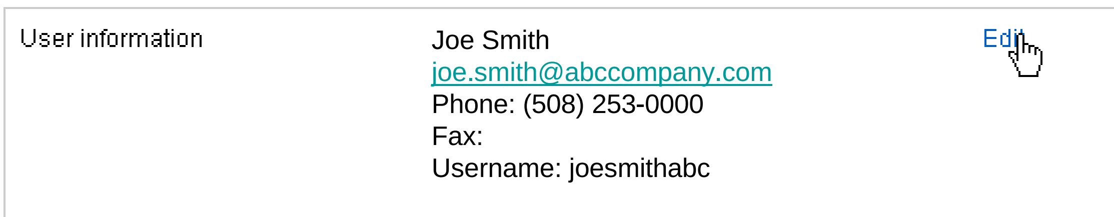


Edit User Information

From the **My Account** tab, click "Personal Information."



Next to your **User information**, click on "Edit."

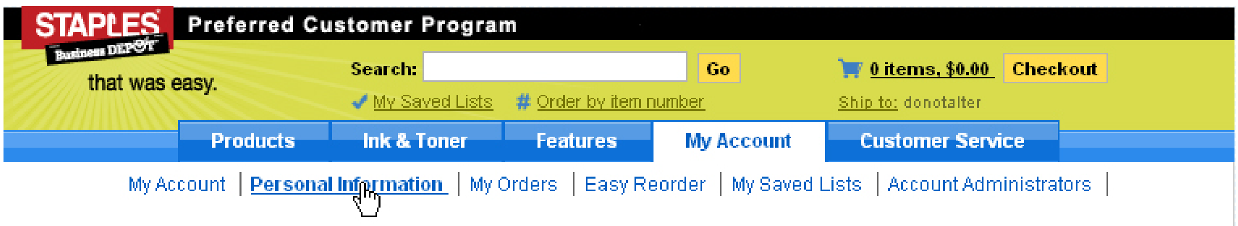


Edit your user information and click "Submit" to confirm your changes.

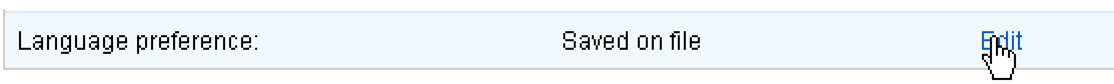
Change Language Preference

Note: Language preference refers to the language that marketing communication from Staples Preferred will be sent to you in. The steps below are not in reference to the language preference for the Staples Preferred web site.

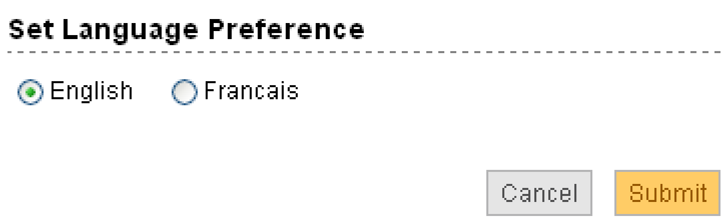
From the **My Account** tab, click “Personal Information.”



Next to **Language Preference**, click on “Edit.”



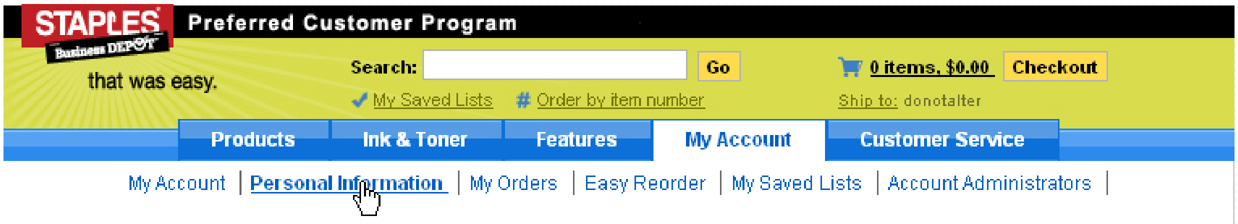
Set your language preference and click “Submit.”



Your language preference will be saved.

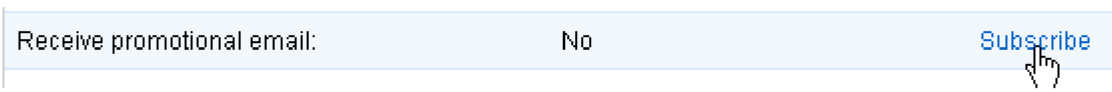
Edit Promotional Email Preferences

From the **My Account** tab, click "Personal Information."



Subscribe

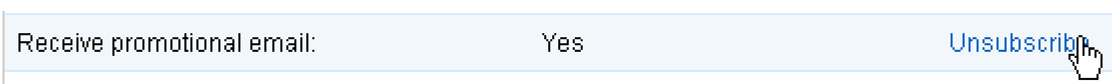
Next to **Receive promotional emails**, click on "Edit."



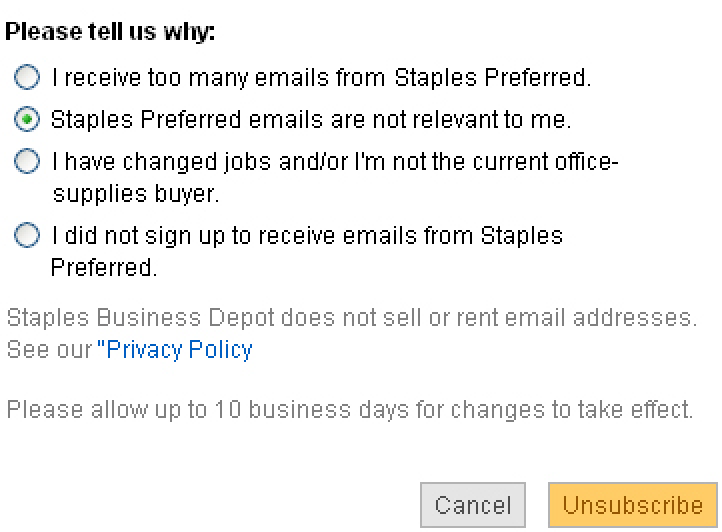
Click "Subscribe." You will begin to receive promotional emails within 3-4 weeks.

Unsubscribe

Next to **Receive promotional emails**, click on "Unsubscribe."

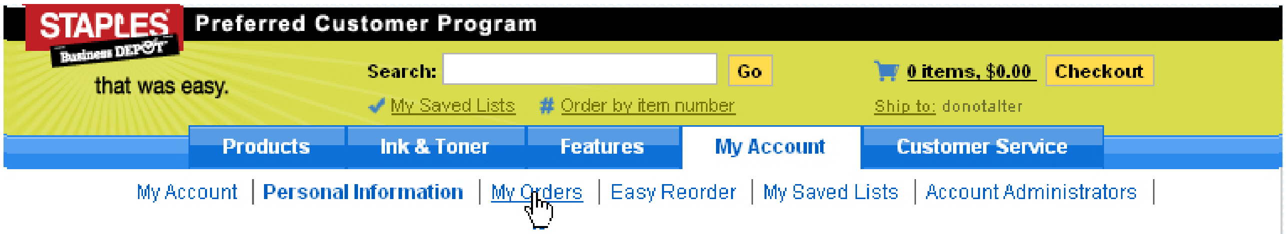


Indicate your reason for unsubscribing and then click on "Unsubscribe."



Check Order Status

From the **My Account** tab, click “My Orders.”



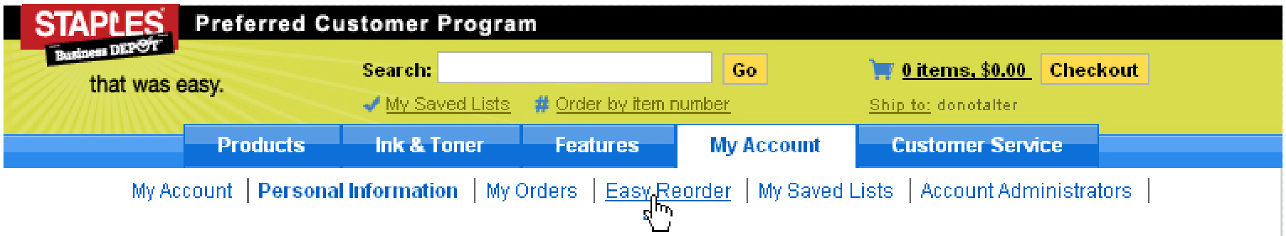
Your order history will appear including the status of the order. *(Note: order history includes orders placed on-line or by phone only within the last 13 months only.)*

Date ▾	Order Number	Type	Order Total	Status	Reorder
01/31/08	5475000370	Online	$99.87	On Hold	Reorder items

If you click on the order number, you are able to view the order details (ship-to address, bill-to address, payment information and items).

Reorder an Item

From the **My Account** tab, click “Easy Reorder.”



Your most frequently purchased items from the last 13 months will appear.

From this page, you can reorder any of these items by entering the quantity and clicking on “Add to Cart.”

Reorder from My Order

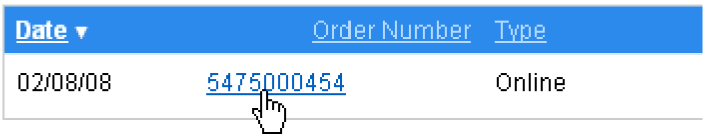
Entire Order

You can also reorder items from your Order History. Click on “My Orders” on the top toolbar. Your order history will appear. If you click on “Reorder items” next to all of your items, you will begin reordering the entire order.

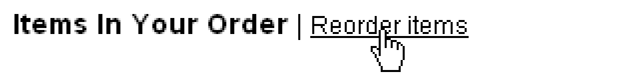
Date ▾	Order Number	Type	Order Total	Status	Reorder
01/31/08	5475000370	Online	$99.87	On Hold	Reorder items

Individual Item

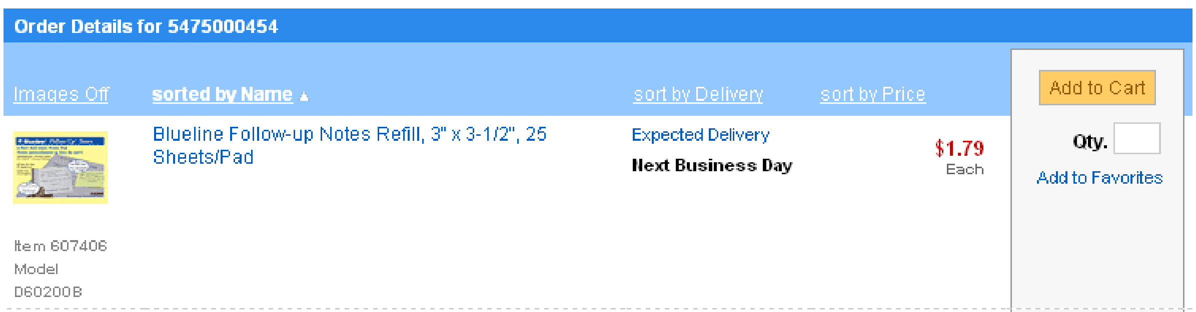
To order an individual item from Order History, click on the order number.



This will open up your Order Detail Page. Click on “Reorder Items” located towards the middle of the page.

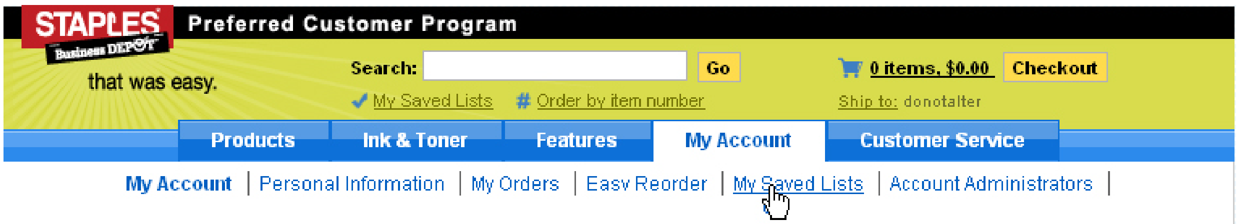


The **Easy Reorder** page will open and you can add individual items and quantity to your “Shopping Cart.”



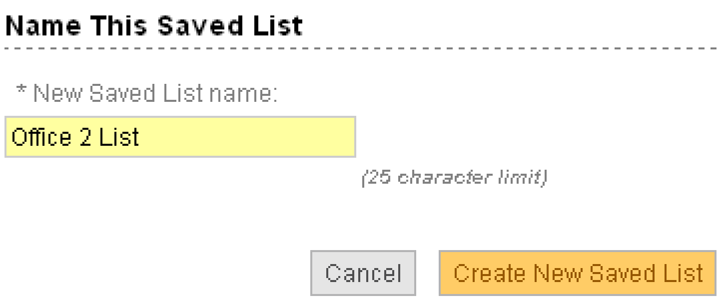
Create Saved Lists

From the **My Account** tab, click “My Saved Lists.”



Click on the button, “Create New Saved List.”

Name your saved list (limited to 25 characters) and click on the “Create New Saved List” button.



Once you name the list, you can begin to add items to your **Saved List**. To view your **Saved List**, click on “My Saved List” on the top toolbar.

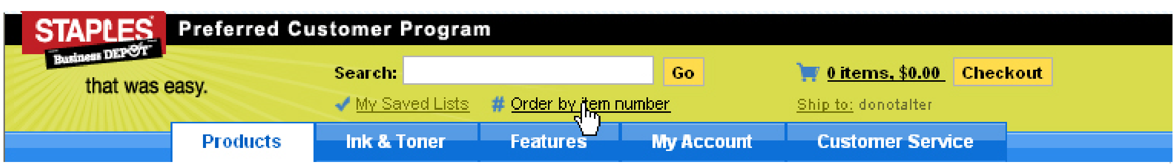
Add an Item to a Saved List

While shopping for an item, if you click on “Save Item to List ” you can add the item to your list.

Specify name of the list that you wish to add the item to and click on the “Save Item to List” button. The item will be added to your saved list.

Add Item from Order by Number

You can also add items to your saved list from the **Order by Item Number** page. Click on “# Order by item number” found on the top toolbar.

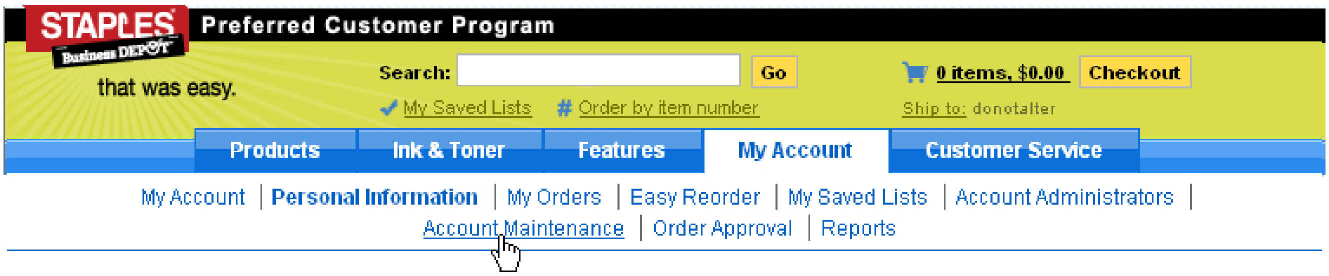


Add the item number in the item box, add desired quantity and click on the “Save Item(s) to List” button.

Specify name of the list you wish to add the item to and click on the “Save Item(s) to List” button. The item will be added to your saved list.

Set Order Approval Limits

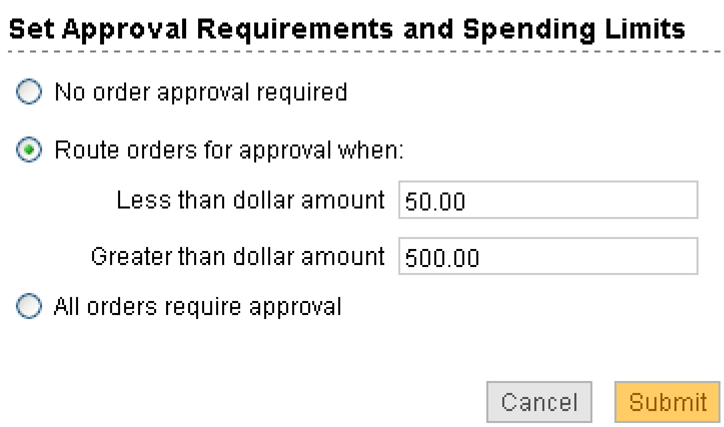
From the **My Account** tab, click “Account Maintenance.”



From the **Account Maintenance** page, select “Order Approval Limits.” You have three choices of order limits:

- No order approval required
- Dollar spend limits (more or less than $)
- All orders require approval

Select your limit preference and click “Submit.” Your approval limits have been saved and will apply for all orders under this master account.

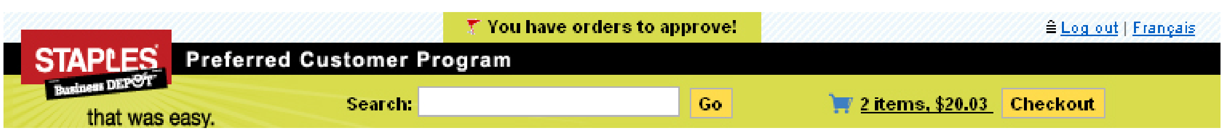


Approve an Order

Once an order requiring approval is submitted by a user, an email will be sent to you alerting you that you have orders requiring your approval. *Note: Orders pending approval can only be changed for method of payment. Order details such as: SKUs, SKU notes, quantities, etc. cannot be edited.*

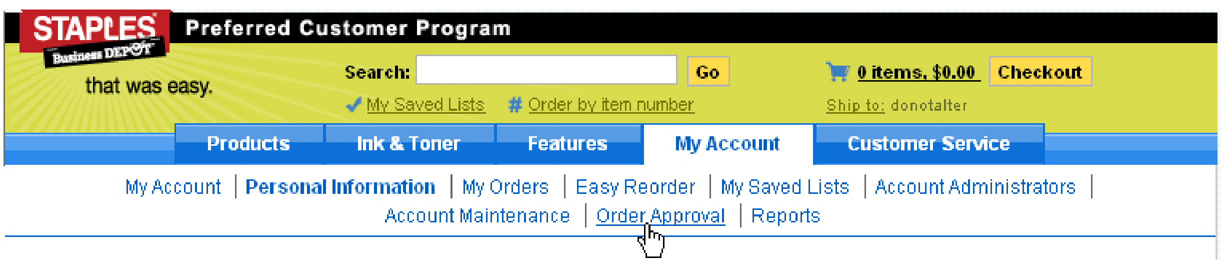
Upon login to the Staples Preferred Web Site, there are two ways to access the pending order:

1. You can click on the **Order Approval Message** found at the top of the home page.

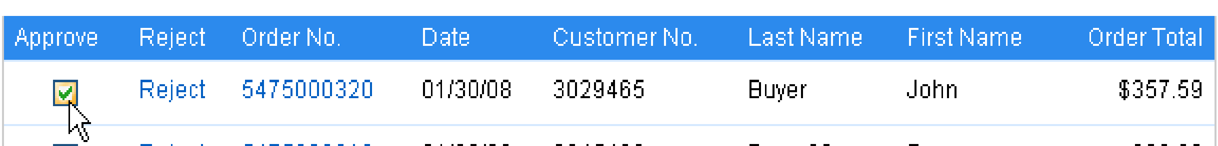


<u>OR</u>

2. You can also access orders pending your approval from the **My Account** tab. Click “Order Approval.”



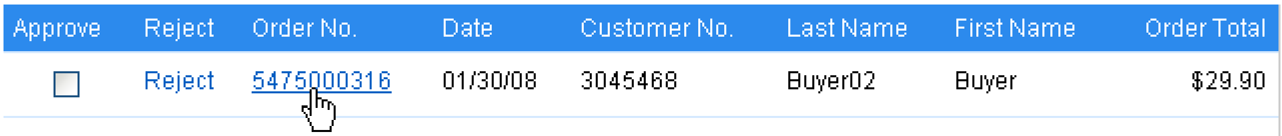
You will open up the **Approve Orders: Orders Pending Approval** page. Choose the order number or numbers you wish to approve by checking the checkbox next to your target order(s) and Click “Approve Selected.” To select all orders, click the “Select All” link.



A confirmation message will appear on this page, “Your order(s) have been approved and submitted for processing.” A confirmation email will be sent to the original person who placed the order to let them know that their order has been approved.

Approve Order from Order Details Page

If you need to make edits to a order prior to approving the order, click on the "Order Number."



This will open up the **Order Approval Detail** page. You will be able to add additional shipping information and/or change the method of payment from this page. Once you have made those edits, you can approve the order by clicking on "Approve."

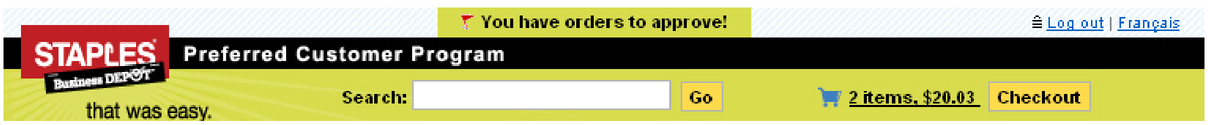
A confirmation message will appear on this page, "Your order(s) have been approved and submitted for processing." A confirmation email will be sent to the original person who placed the order to let them know that their order has been approved.

Reject an Order

Once an order requiring approval is submitted by a user, an email will be sent to you alerting you that you have orders requiring your approval.

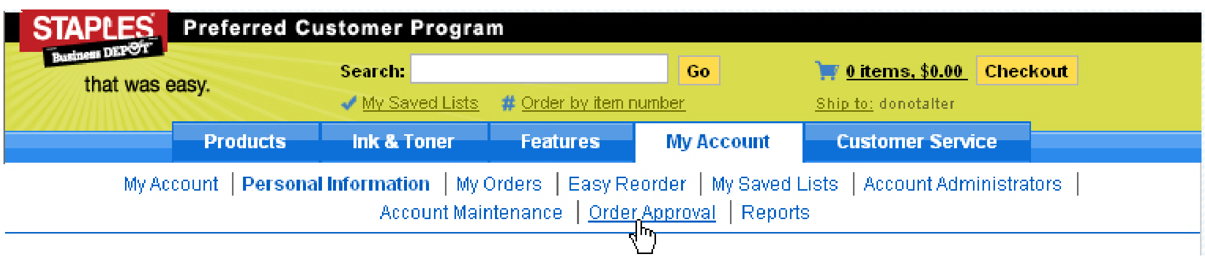
Upon login to the Staples Preferred Web Site, there are two ways to access the pending order:

1. You can click on the **Order Approval Message** found at the top of the home page.



OR

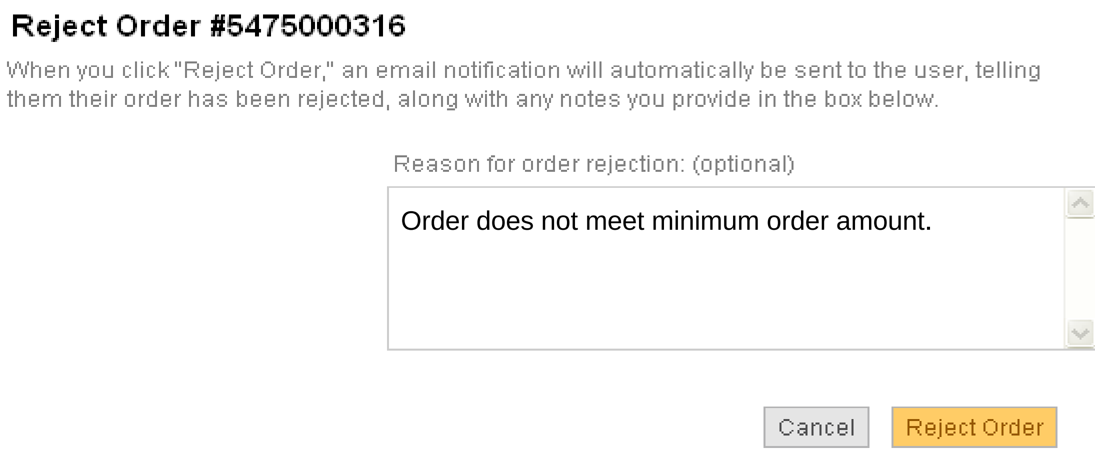
2. You can also access pending orders from the **My Account** tab. Click “Order Approval.”



You will open up the **Approve Orders: Orders Pending Approval Page**. Choose the order number you wish to reject and click “Reject.” *Note: you can only reject one order at a time.*

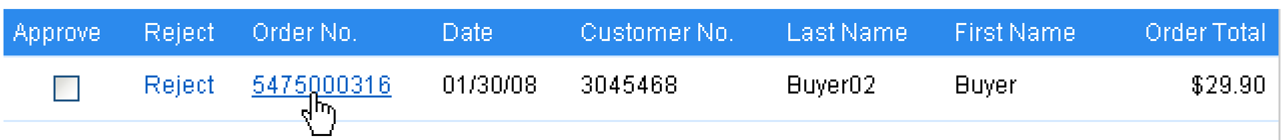
Approve	Reject	Order No.	Date	Customer No.	Last Name	First Name	Order Total
☐	Reject	5475000316	01/30/08	3045468	Buyer02	Buyer	$29.90

The **Reject Order** page will appear asking you to confirm the rejection of the order. You will have the option to add a note to the user letting them know why the order has been rejected. To finalize the rejection, click on the “Reject Order” button.

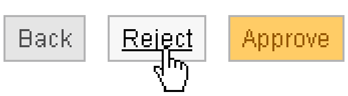


Reject Order from Order Details Page

If you need to make edits or review the order details prior to rejecting the order, click on the “Order Number.”



This will open up the **Order Approval Detail** page. Once you have made edits or reviewed the details, you can reject the order by clicking on “Reject.”

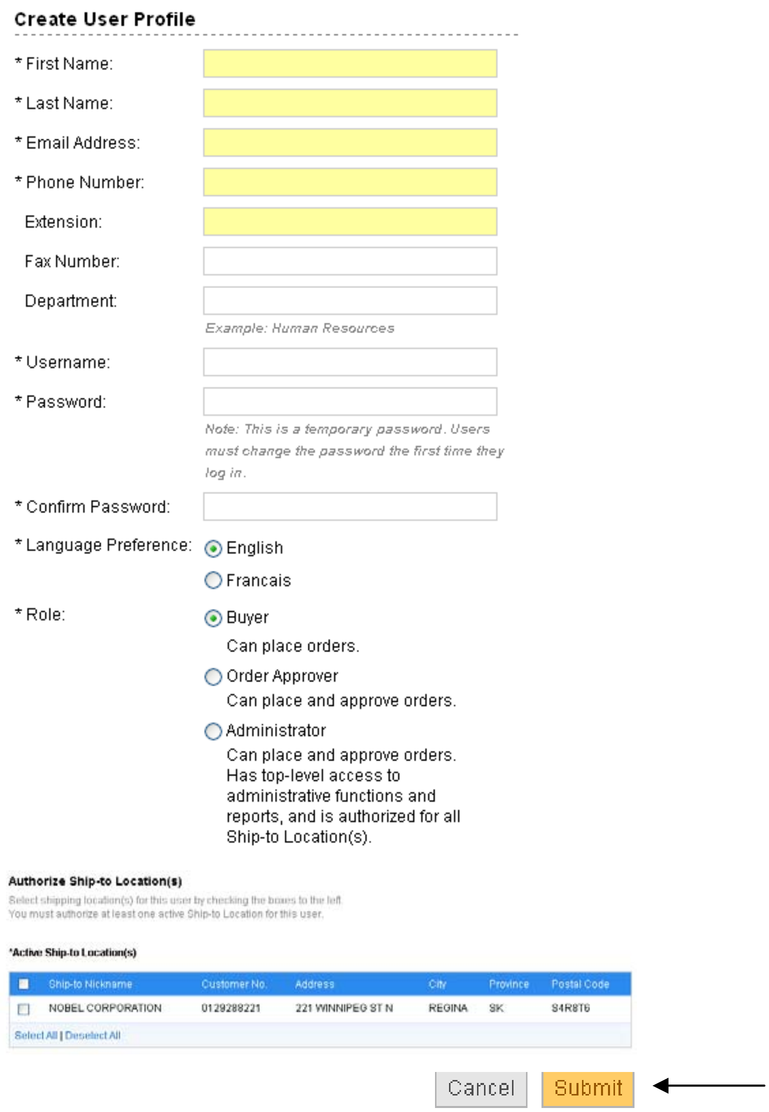


The Reject Order page will appear asking you to confirm the rejection of the order. You will have the option to add a note to the user letting them know why the order has been rejected. To finalize the rejection, click on the “Reject Order” button.

Create New User Profile

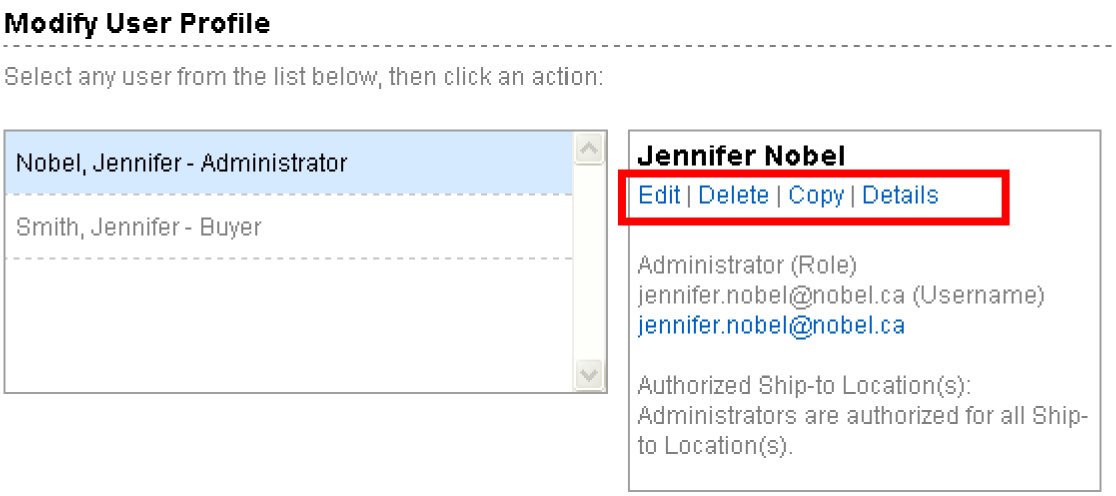
From the **My Account** tab, click “Account Maintenance” and then click “User Management.” The **User Management** page will open up. At the top of the page is the “Create New User” button. Click on this button.

The **Create User Profile** page will open. Add all required personal user information, including user name and password for the new user. Also specify at least one active Ship-to Location and user role for the individual. Once you have finished entering all of the individual information, click “Submit.”



Manage Existing User Profiles

From the **My Account** tab, click "Account Maintenance" and then click "User Management." The **User Management Page** will open up. All existing users for this account will be listed in the middle of the page.



Edit User Information

From the **User List**, click on the name of the user you wish to edit. The username will appear to the right of the user list. Click on "Edit" found right below the user's name. The user's profile will appear. Make any edits to the information and then click "Submit." *Note: You can reset a user's password from this page.*

Delete User

From the **User List**, click on the name of the user you wish to delete. The username will appear to the right of the user list. Click on "Delete" found right below the user's name. A deletion confirmation page will appear. To confirm deleting the user, click on the "Delete User" button.

Copy User

From the **User List**, click on the name of the user you wish to copy. The user name will appear to the right of the user list. Click on "Copy" found right below the user's name. This will copy the user's profile and can be used as a template to create additional new users.

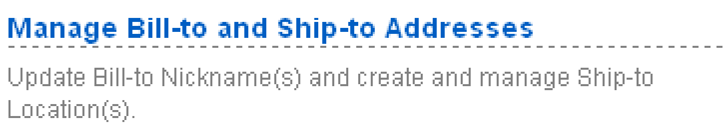
Details

From the **User List**, click on the name of the user you wish to view. The user name will appear to the right of the user list. Click on “Detail” found right below the user’s name. This will allow you to view the user’s profile details.

Modify Bill-to Contact

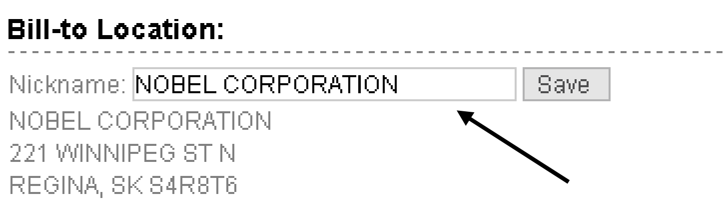
You are able to modify the nickname of the **Bill-to Location**. This is the only information you can modify for Bill-to information. If you need to make additional changes to your company's Bill-to information, contact your *Staples Account Manager*.

From the **My Account** tab, click "Account Maintenance". On the **Account Maintenance** page, click on the "Manage Bill-to and Ship-to Addresses."



Choose the bill-to location you wish to rename from the list of locations and click on the "View/Manage Details" button.

The bill-to details for this location will display. You can edit the nickname of this location in the field titled "Nickname." Click "Save" once you have finished your edits.



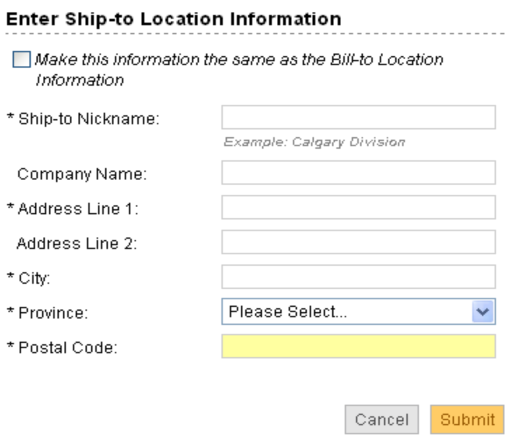
Manage Ship-to Addresses

You are able to add, edit and delete ship-to locations. Under the **My Account** tab click "Account Maintenance." Then click on "Manage Bill-to and Ship-to Addresses". This will open up the **Bill-to Location** page**.**

Select the Bill-to Location for the Ship-to Location you wish to edit or create a new location for. Click on the "View/Manage Details" button.

Create New Ship-to Location

Click on the "Create New Ship-to Location" button. You will be directed to the **Create Ship-to Location** page. Add all of the information for the new Ship-to Location on this page and then click "Submit" to save and activate this new location.

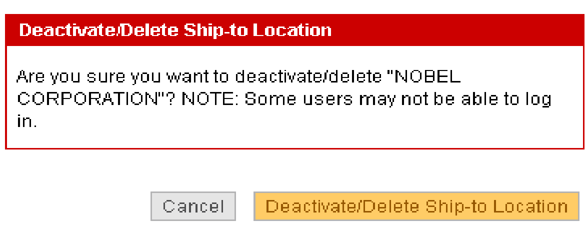


Delete Ship-to Location

You can delete any ship-to location (active or inactive). Next to the ship-to location name, click "Delete."

	Nickname	Address	City	Province	Postal Code	
Delete	NOBEL CORPORATION	221 WINNIPEG ST N	REGINA	SK	S4R8T6	Deactivate

A Deactivate/Delete Ship-to Location confirmation message will appear. Click on the "Deactivate/Delete Ship-to Location" button to confirm the deletion.



Activate/Deactivate Ship-to Location

You can activate or deactivate a ship-to location from the **Bill-to Details** page. To activate a location, select the location from the Inactive sites and click “Activate.”

	Nickname	Address	City	Province	Postal Code	
Delete	NOBEL250	221 WINNIPEG ST N	REGINA	SK	S4R8T6	Activate

An activate ship-to location confirmation message will appear. To confirm the activation of the location, click on the “Activate Ship-to” button.

Activate Ship-to Location

Are you sure you want to activate "NOBEL250"? NOTE: All previously authorized users will now have access to this Ship-to Location.

Cancel | Activate Ship-to

To deactivate a site, select the location from the active site and click “Deactivate.”

	Nickname	Address	City	Province	Postal Code	
Delete	NOBEL CORPORATION	221 WINNIPEG ST N	REGINA	SK	S4R8T6	Deactivate

A deactivate/delete ship-to location confirmation message will appear. Click on the “Deactivate/Delete Ship-to Location” button to confirm the deactivation.

Deactivate/Delete Ship-to Location

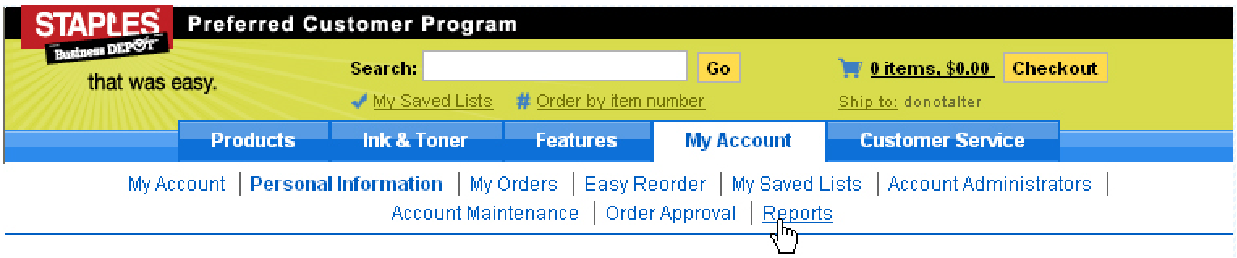
Are you sure you want to deactivate/delete "NOBEL CORPORATION"? NOTE: Some users may not be able to log in.

Cancel | Deactivate/Delete Ship-to Location

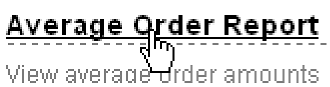
Average Order Report

The **Average Order Report** is designed to provide a report of the average order amounts by bill-to location for a specific date range. *Note: data is available only for the last 13 months.*

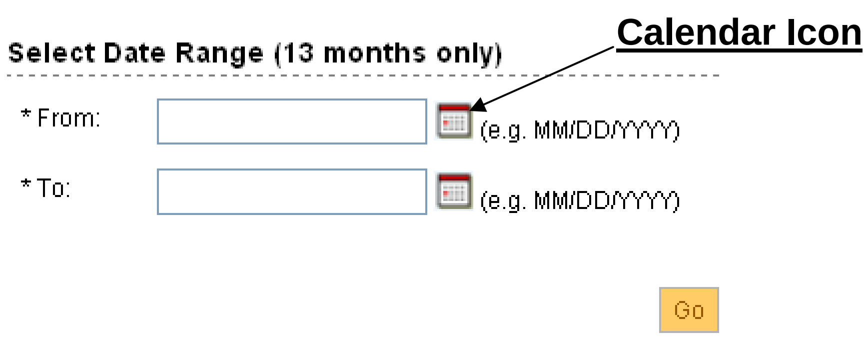
To access this report, from the **My Account** tab**,** click “Reports.”



From the **Report** home page**,** click the link to “Average Order Report.”



Enter the date range that you would like data for. Dates need to be input as MM/DD/YYYY. You can also click on the calendar icon to select dates directly from a calendar. Once your date range is inputted, click “Go.”



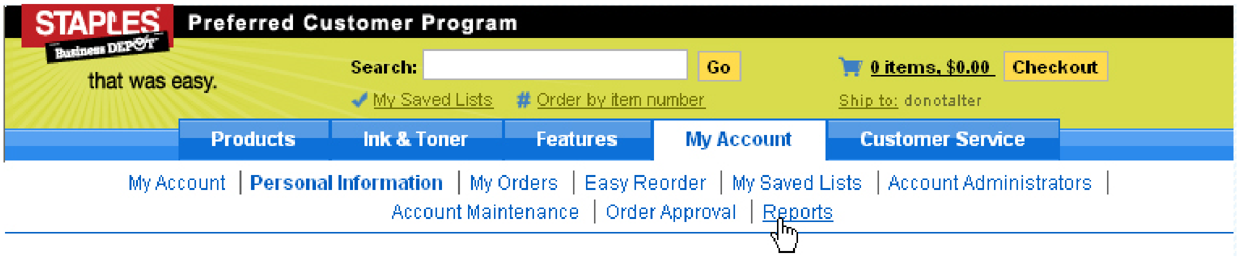
Report data will appear. If you wish to print this report, it is recommended that you download the information to Excel and print from there. *Note: if you print directly from the Web, the report will not retain its format and information will not properly print.*

To download the information to Excel, click on the link “Download to Excel.”

Spending Report

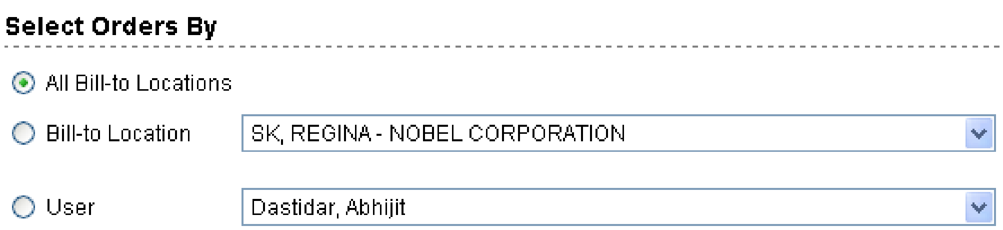
The **Spending Report** is designed to provide a report of number of orders placed, order volume and the average order amounts for either bill-to location(s) or user(s) for a specific date range.

To access this report, from the **My Account** tab, click “Reports.”

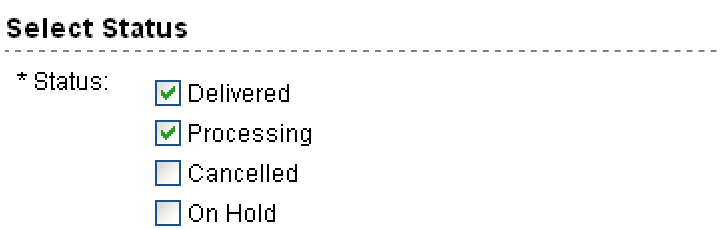


From the **Report Homepage,** click the link to “Spending Report”.

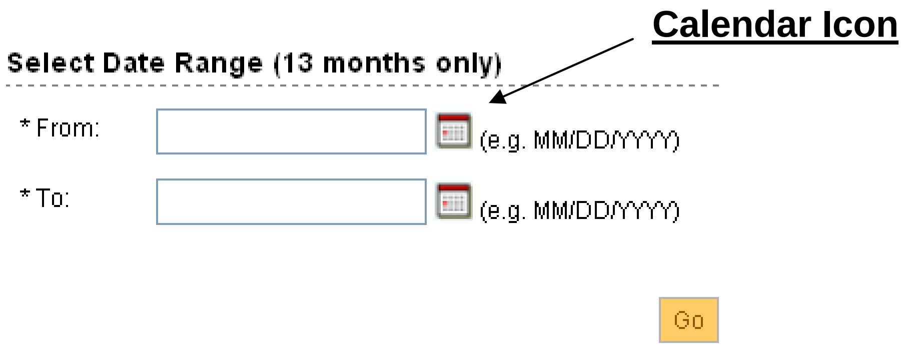
Select the category for which you want orders to be classified by: All Bill-to Locations, Specific Bill-to Location or Users.



Specify the order status you wish to report on.



Finally, Enter the date range that you would like data for. Dates need to be input as MM/DD/YYYY. You can also click on the calendar icon to select dates directly from a calendar. Once your date range is inputted, click “Go” to run the report.



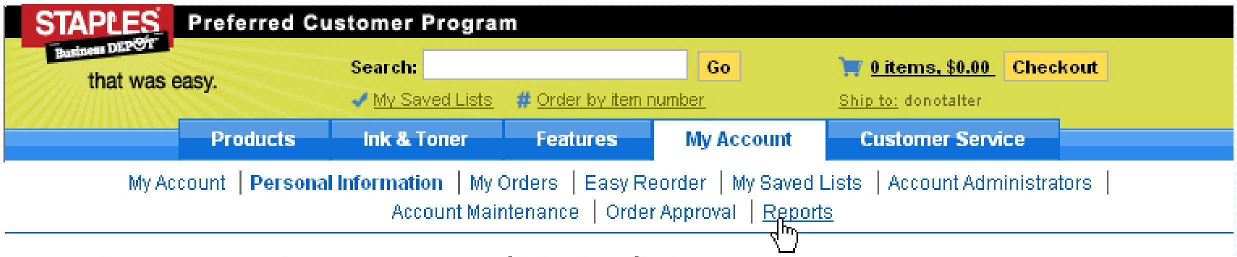
Report data will appear. If you wish to print this report, it is recommended that you download the information to Excel and print from there. *Note: if you print directly from the Web, the report will retain its format and information will not properly print.*

To download the information to Excel, click on the link “Download to Excel.”

User Report

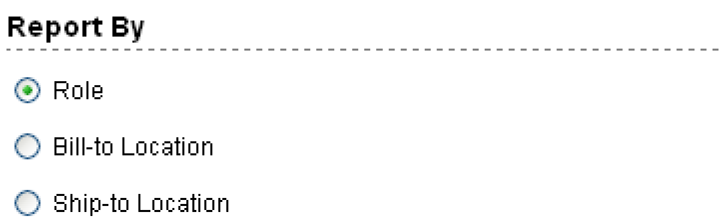
The **User Report** is designed to provide a list of users classified by either role, bill-to Location or ship-to Location.

To access this report, from the **My Account** tab**,** click "Reports."

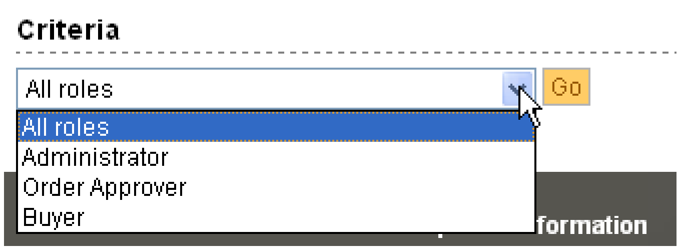


From the **Report** home page**,** click the link to "User Report."

Select from Role, Bill-to Location or Ship-to Location.



Under criteria, click on arrow to the right. A drop-down menu will appear with options for criteria. Select the criteria you wish to specify and click "Go" to run the report.



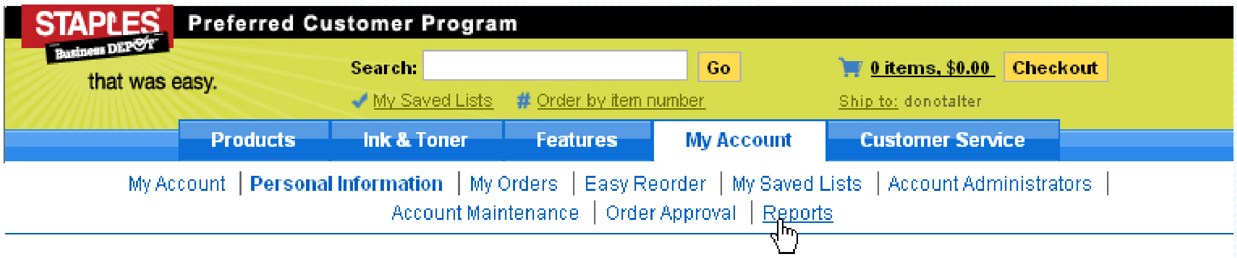
Report data will appear. If you wish to print this report, it is recommended that you download the information to Excel and print from there. *Note: if you print directly from the Web, the report will not retain its format and information will not properly print.*

To download the information to Excel, click on the link "Download to Excel".

Top 75 Report

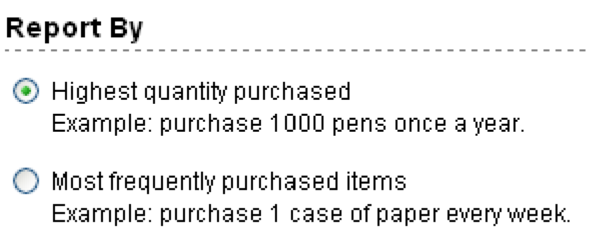
The **Top 75 Report** is designed to provide a report of the top 75 items purchased for a specific bill-to location or the entire account.

To access this report, from the **My Account** tab, click “Reports.”

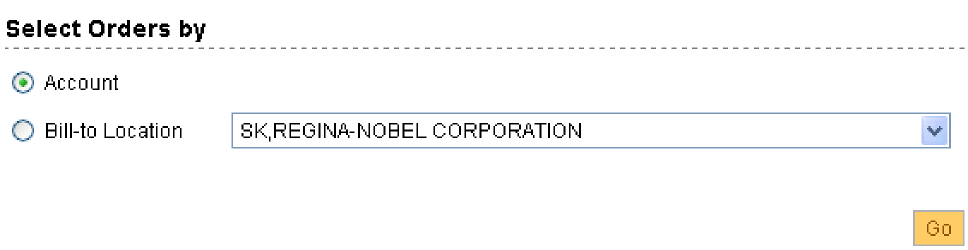


From the **Report** home page, click the link to “Top 75 Report.”

Specify if you want the report to display data for the most frequently ordered items or items with the highest quantity.



Next, specify if the report will be for the entire account or specific bill-to locations. Click “Go” to run the report.



Report data will appear. If you wish to print this report, it is recommended that you download the information to Excel and print from there. *Note: if you print directly from the Web, the report will not retain its format and information will not properly print.*

To download the information to Excel, click on the link “Download to Excel.”

Top 75 Highest quantity purchased Report for NOBEL CORPORATION

Download to Excel | Change Criteria