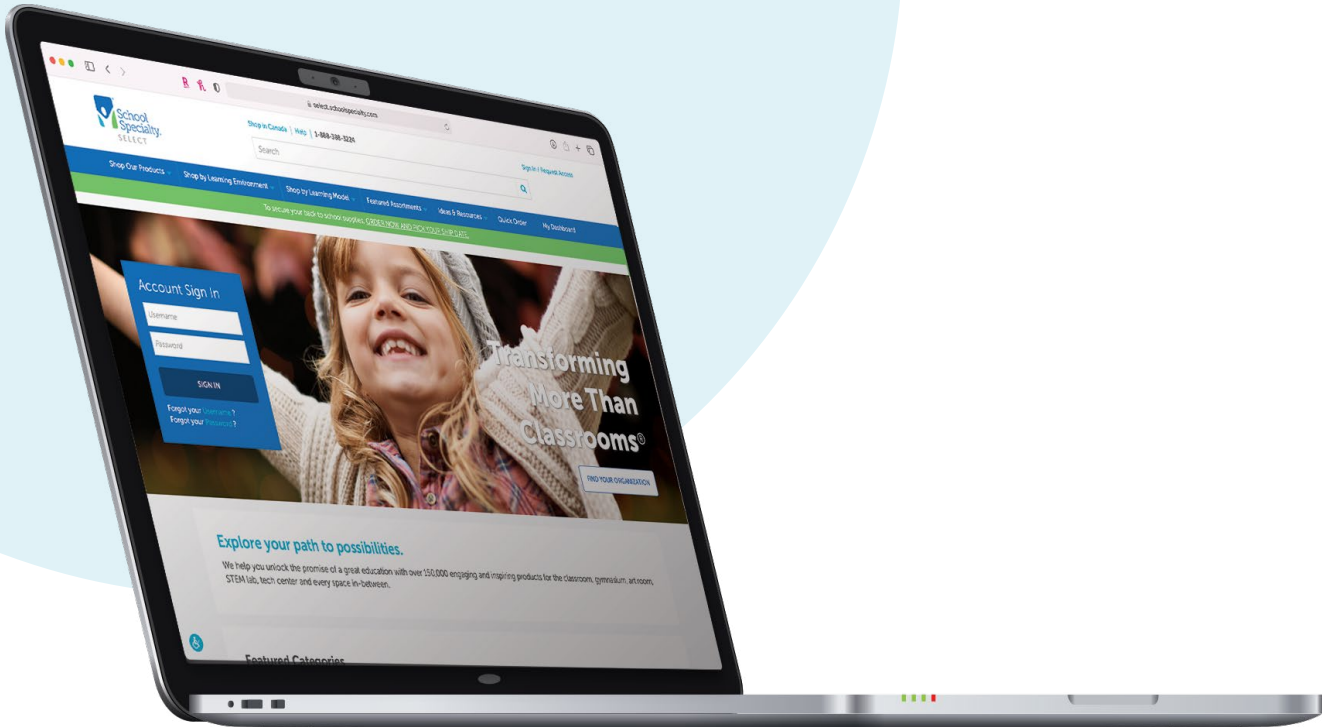# A Guide to Your Online Account

Welcome to School Specialty

It's easy to save time and money by shopping School Specialty online. Follow these tips for greater ease and control over your account.

Always **SIGN IN** to your account before shopping online, so you can view your district's discounted pricing and take advantage of all our online shopping features.

Welcome to your School Specialty Online Account!

This guide will help you set up your account quickly and easily with step-by-step start-up instructions and answers to common questions. Start saving time and money, while increasing the productivity of your entire team!

Additional support and resources:

For Self-Help
Find our how-to videos and quick help guides, request an account review, or sign up to learn more about our Punchout Integration capabilities at
select.schoolspecialty.com/select-advantage (U.S. customers) or
select.schoolspecialty.ca/select-advantage (Canadian customers)

For Immediate Assistance:

Email: websupport@schoolspecialty.com
Call: 888-388-3224, Monday to Friday, 7 am - 5 pm CST
Chat: Monday to Friday, 7 am - 5 pm CST
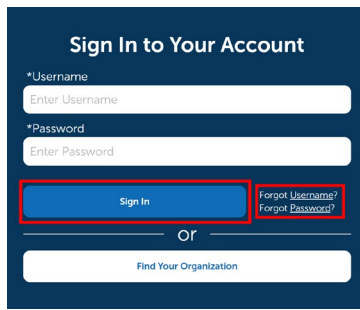
For Your Sales Representative:
Contact information is available under your account sign-in homepage and your dashboard.

Table of Contents

Signing In

Sign In to Your Account

*Username

Enter Username

*Password

Enter Password

Sign In   Forgot Username?
               Forgot Password?

or

Find Your Organization

- Visit **select.schoolspecialty.com** (U.S. customers) or **select.schoolspecialty.ca** (Canadian customers).
- Under **Sign in to Your Account**, enter your Username and Password, then **Sign In**.
- If you do not know your username or password, click **Forgot Username?** or **Forgot Password?** to recover. You'll instantly receive an email containing your sign in information. For more information about password resets, please see page 22.

4 Convenient Ways to Shop

1. Search

- In the search bar at the top of the page, type the description or item number of the item you're looking for, then click the magnifying-glass **Search** icon.
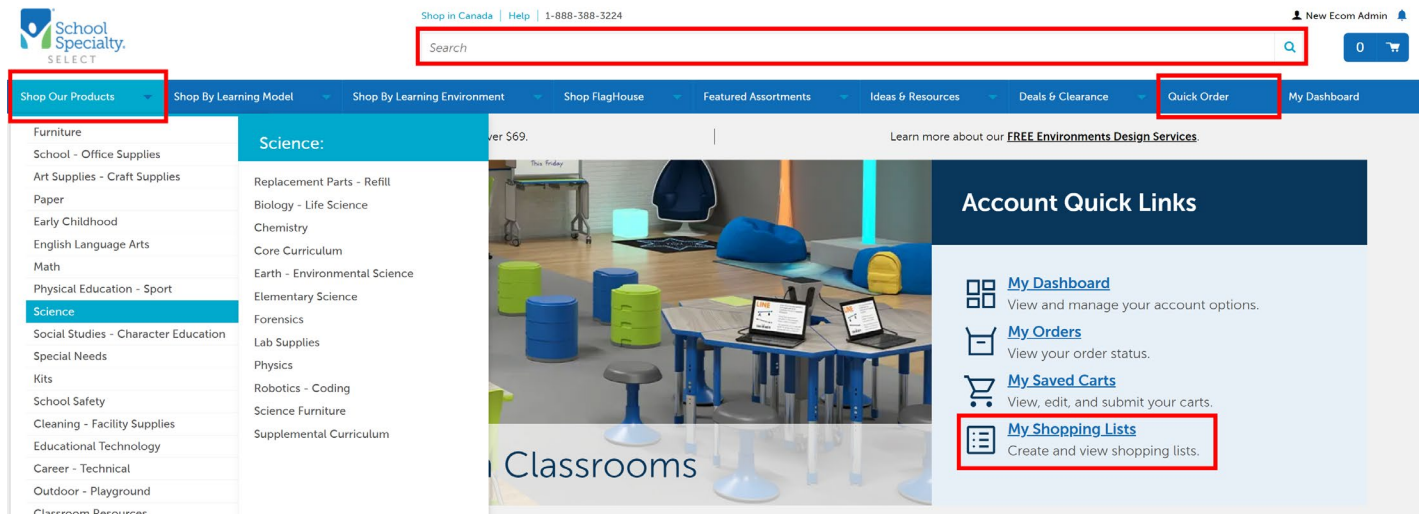
2. Shop Our Products by Category

- Select the **Shop Our Products** tab on the left side of the top blue navigation bar.

3. Order by Number using Quick Order

- Select the **Quick Order** tab on the right side of the top blue navigation bar.
- Enter your item numbers and quantities, then click **ADD TO CART**.

4. Order with online Shopping Lists

- You can create and save lists of commonly ordered items for convenient future ordering.
- On every product page, you'll see the option to **ADD TO LIST**.
- To create a new list, click the drop-down arrow next to **ADD TO LIST** and select **Create a new Shopping List.**
- To add to an existing list, select the list name and your items will be added to it.

Shop in Canada | Help | 1-888-388-3224   New Ecom Admin

Search

| Shop Our Products | Shop By Learning Model | Shop By Learning Environment | Shop FlagHouse | Featured Assortments | Ideas & Resources | Deals & Clearance | Quick Order | My Dashboard |

Furniture
School - Office Supplies
Art Supplies - Craft Supplies   Science:
Paper   Replacement Parts - Refill
Early Childhood   Biology - Life Science
English Language Arts   Chemistry
Math   Core Curriculum
Physical Education - Sport   Earth - Environmental Science
Science   Elementary Science
Social Studies - Character Education   Forensics
Special Needs   Lab Supplies
Kits   Physics
School Safety   Robotics - Coding
Cleaning - Facility Supplies   Science Furniture
Educational Technology   Supplemental Curriculum
Career - Technical
Outdoor - Playground
Classroom Resources

over $69.   Learn more about our FREE Environments Design Services.

Classrooms

Account Quick Links

My Dashboard
View and manage your account options.

My Orders
View your order status.

My Saved Carts
View, edit, and submit your carts.

My Shopping Lists
Create and view shopping lists.

Accessing Your Account Dashboard and Notifications

- Use the Account Quick Links on your homepage for quick access to key features, or select the notification bell icon at the top right for your actionable notifications.

- Your full account options can be found under **My Dashboard**. Your account options are based on your setup.

- Your Sales Team's contact information is conveniently located on your homepage and **My Dashboard.**

Submitting Your Orders

- Click the Shopping Cart icon at the top right of the page and select **GO TO CART**.

- Review your items. Change quantities simply by typing a new quantity in the box. To remove an item, just click **Remove**.

- Pre-approved discounts will automatically display as your Pricing Program. Approvers and Administrators can choose another program if there is more than one.

- Select the **ACTIONS** menu for options to:
  - **Delete Multiple Items** from your cart.
  - **Delete Cart**
  - **Budget Codes** to enter or select your budget codes, which can be applied to the all cart items or by line item.
  - **Copy To New Cart** to copy cart items to a new cart. Great for multiple cart duplication!
  - **Save As List** to save item(s) to a Shopping List.
  - **Save Cart** to save your cart and return to it or create and start a new cart.

- Click **+Have Promotion Codes?** to enter and apply a promo code.

- Select your **Ship To** address from the existing list if it is not the default.

- Verify the correct contact information is in the Attention: fields for the shipping label and email updates.

  - To make changes, use **Edit** then **Save Attention Details.**

- Items will ship when ready unless you choose **Request Future Shipping Date** which delays the start of shipping until your selected date.

- Choose your Payment and Billing Address from the available options if it is not the default.

IMPORTANT! Your billing address must match your credit card's billing address. Use the toggle to set a payment method as your default, if applicable.

- Enter your purchase order or reference number if you are invoicing and have one. All final Approvers invoicing must enter a purchase order or reference number.

- To submit, click **SUBMIT FOR APPROVAL** or **PLACE ORDER**.

- Not ready to send? Click **SAVE CART** or simply sign out, and your cart will be saved for next time.

- **Print** or **Download** a copy of your cart, if needed.

- Once your order is submitted and approved, an Order Confirmation email will be sent to you confirming School Specialty's receipt of your order.
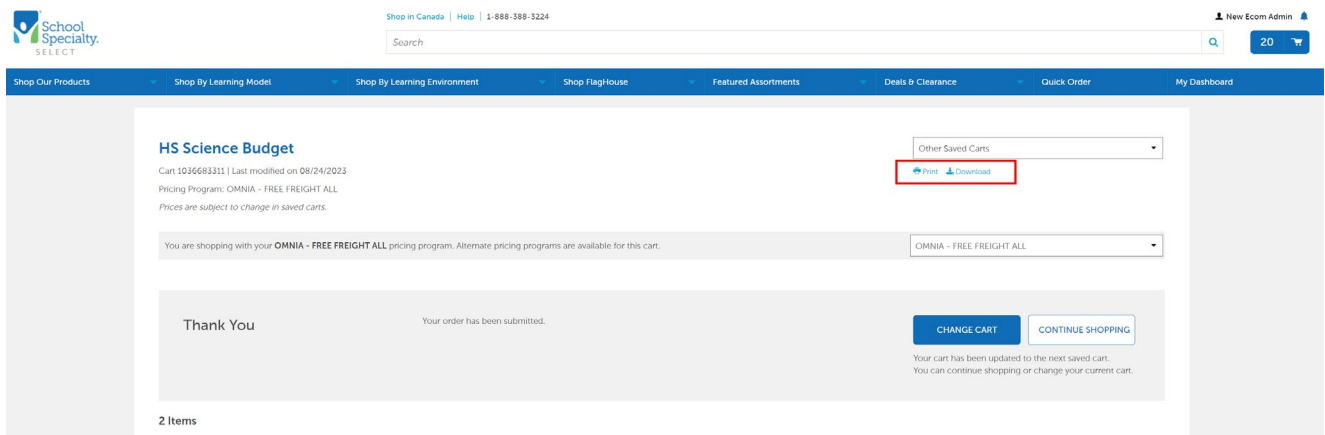
Managing Users
## (For Administrator Use Only)

Accessing Your Users

- Under **My Dashboard,** click on **Users** to see the listing of the current users.
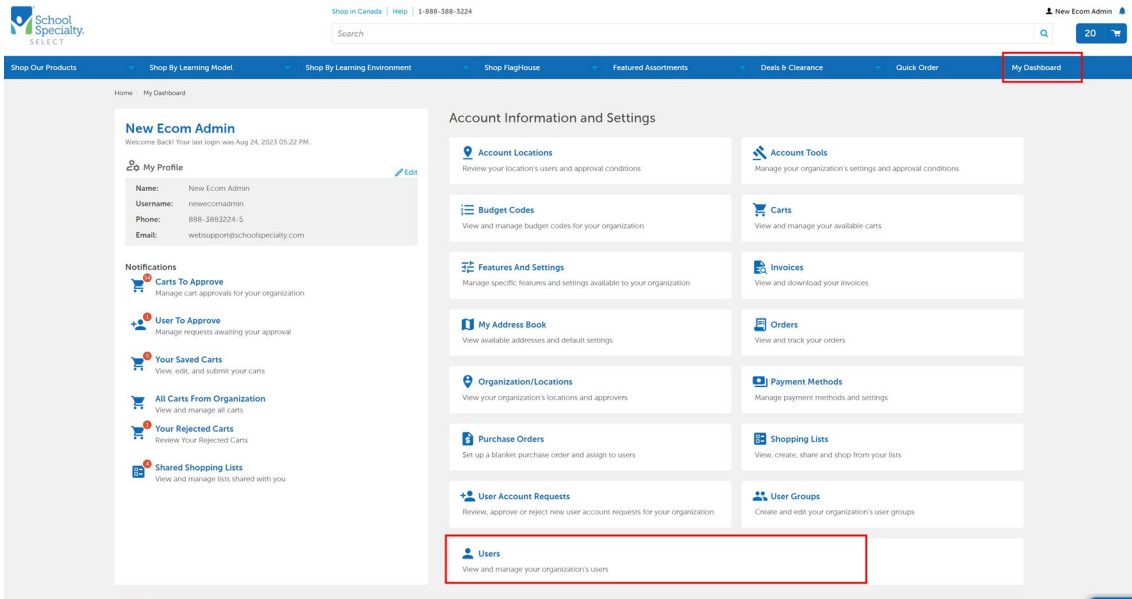
- Search for users by name or location.

- Click any user's name to view the User Details, Accounts & Groups, Approval Workflow Sequence, Contact Information, and more options.

- Click the **ACTIONS** menu on the Users page to reveal more options.

  - **PERMISSIONS/RESTRICTIONS:** Use this option to assign or unassign user permissions and restrictions for multiple users or all users at one time.

  - **DELETE USER(S):** Select users by checkbox and click **DELETE USER(S)** to delete.

  - **DOWNLOAD LIST:** This will download a list of all user information to an Excel spreadsheet.

  - **USER REPORT:** This will download a detailed list of all user-profile information including roles, groups, and approval requirements and responsibilities.

ProTip! Disabled users as shown below are locked out of their account due to too many incorrect password attempts. To unlock their account, select **ENABLE.** The user should reset their password.

7
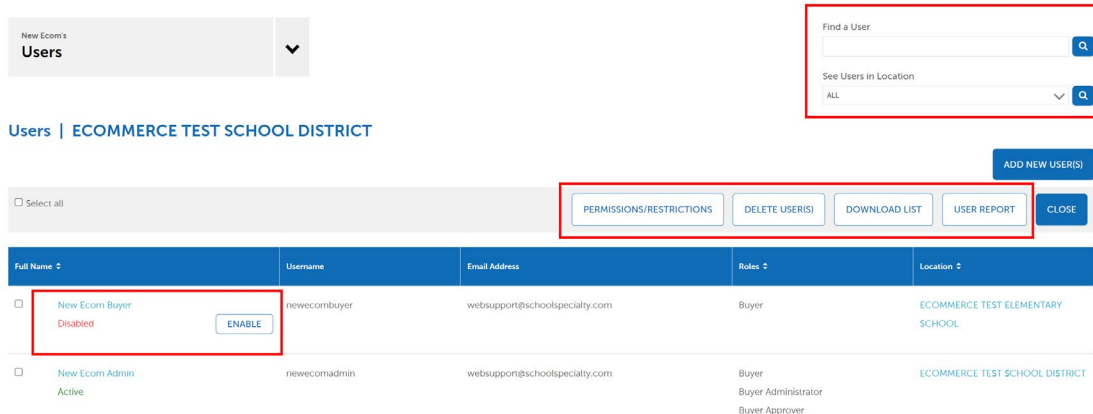
Adding a New User

- Click **ADD NEW USER(S).**
- Choose the account location for your user by clicking the magnifying glass search icon in the Account Search field. Choose your location and click **CONFIRM**.

ProTip! Generally, users on a child account (i.e., school) can bill to either the child or parent account (i.e., district) but can only ship to the child account location. Users on a parent account can bill only to the parent account but can ship to any child account location. Your user's approval workflow is linked to the user's account location.

- Click **Select shipping address** to choose your user's available and default shipping address.
- Fill in the appropriate information for the user including required fields, Roles, Permissions/Restrictions, and User Groups.
    - Click the Information Icon for information regarding these options.
- Click **ADD USER.** A validation email will automatically be sent alerting the new user to create their password.

ProTip! If your staff does not use credit cards, we recommend creating a **Shared User** login instead of multiple buyer logins for easier account maintenance. If you need to add more than 5 users, please see the Bulk Uploading Users or User Groups.

Editing a User

- From **My Dashboard**, go to **Users**.
- From your user list, select the user's Full Name to edit contact information and settings for the user. Options to edit also include the following roles, permissions, and restrictions:

Buyer — Shop and submit carts for approval. (Cannot be removed).

Approver — Approves orders and submit carts.

Administrator — Add Users, assign user roles, view users, edit user information, and view accounts.

Add PO# Restricted — Users assigned this restriction will only be able to choose from their assigned Purchase Order Numbers.

Bill to District Restricted — Users assigned this restriction will not be able to choose the district billing address during checkout.

Bill to Location Restricted — Users assigned this restriction will not be able to choose the location billing address during checkout.

Budget Code Entry Restricted — Users assigned this restriction will only be able to choose from their assigned Budget Codes.

Credit Card Restricted — Restricts shoppers from using a credit card as a payment method to place orders.

Invoice Restricted — Users assigned this restrictions will not be able to choose invoice as a payment type during checkout

New User Email Notifications Restricted — Users assigned this restriction will not receive new user request email notifications. New user requests will still appear on all Buyer Administrator dashboards.

Override Product Catalog Filter Permitted — Users with this permission can see all items in the product catalog. (Only applicable to accounts with a Catalog filter)

Save Credit Card Restricted — Users assigned this restriction will not be able to save credit card information during checkout.

Require Email Address for PunchOut Notification — This permission enables a required email address field on the cart page which triggers an email to the address specified informing them that there is a cart pending review and retrieval.

Simplified Checkout View — This permission hides the Request Future Shipping Date, Payment Method, and Purchase Order/ Reference# fields for simplified checkout for users who submit carts to an approver.

- Click **SAVE CHANGES** to complete.

IMPORTANT! The username and the account location cannot be edited. The existing user will need to be deleted and recreated if these need to be updated.

Approving User Accounts

Our website allows guests to request sign-in access under any organization that has an account. A visitor would use **FIND YOUR ORGANIZATION** on the homepage to find accounts by location and name. This is referred to as Online Registration.

IMPORTANT! These requests are sent to the Account Administrator(s) for verification. As an Administrator you will receive notifications to reject or approve and set up users requesting access to your account. If the requester's location or department has a shared user login or an existing Buyer login to use, please reject the request with a note including their credentials.

- Select the notification bell or go to **My Dashboard** to choose **User to Approve.**
- Click the arrow under Full Name to view user details.
- If approving, choose your new user's Role. Buyer is automatically given; assign Approver or Administrator, if needed. Click **APPROVE & SET UP USER** to proceed, or click **REJECT USER** to reject the request.

ProTip! Your User will receive an automated message advising the acceptance or rejection to their request. Use the Notes field to provide any further instructions. For example, if the location has a shared user login that the staff member can use, the request should be rejected and include a note to use the shared user login credentials.

- User approval will navigate you to the new user's profile for review and editing of restrictions/permissions, workflow, and more. Select **SAVE CHANGES** when complete.

Creating Buyer & Approver Groups (For Administrator Use Only)

Set up Buyer and Approver Groups to align with the approval workflow for your district.

When and Why You Need Approver Groups

Every approver of online carts must be a member of an Approver Group. The Approver Group must be created at the same location the user is added. This ensures that carts are routed to the correct individual(s) for approval. Most Approver Groups contain only one user; however, there are times when multiple users need to be members of the same approver group.

IMPORTANT! Approver Groups created on the Parent (i.e. District) account can be assigned to any locations' Approval Conditions. However, Approver Groups created on a Child (i.e. School) account can only be assigned at that location.

Example of a One Person Approver Group: (this is most common)

At East School, Teachers submit carts to Sally Brown the Bookkeeper who then submits to Franklin Armstrong from the District Office. Two Approver Groups would need to be created. One group for the Bookkeeper and another for the District Office Approver to create the workflow from the 1st approver to the 2nd approver.

Approval Level 1:

- Approver Group Name: East School Bookkeeper -AG
- Approver Group Member: Sally Brown the Bookkeeper
- Approval Condition: When Cart value > $0.00, cart is approved by "East School Bookkeeper -AG"

Approval Level 2:

- Approver Group Name: District Office -AG
- Approver Group member – Franklin Armstrong the District Administrator
- Approval Condition: When Cart value > $0.00, cart is approved by "District Office -AG"

Approval Level 1   *Rules Last Modified 12/05/2023 by District Administrator*

When Cart value > **$0.00**
It needs approval from one of the following: **East School Bookkeeper- AG**

Approval Level 2

When Cart value > **$0.00**
It needs approval from one of the following: **District Office- AG**

Then submit to School Specialty for Purchase

Example of a Two Person Approver Group: (this is less common)

Both the Bookkeeper and the Principal want to be notified about pending carts, view the carts, and have either of them approve the carts. Both the Bookkeeper and Principal users are added to the Approver Group and just one member would need to approve a cart.

- Approver Group Name: East School Office -AG
- Approver Group Members: Bookkeeper Sally Brown & Principal Charlotte Braun
- Approval Condition: When Cart value >$0.00, cart is approved by a member of the Approver Group "East School Office -AG"

Group Name ⇕	Assigned Users	Location ⇕	Type
East School Office- AG	Charlotte Braun, Sally Brown	WEB SUPPORT TEST MIDDLE SCHOOL	Approver Group

When and Why You Need Buyer Groups

Buyer Groups need to be created only when users in the same location submit carts to different approvers or are not approvers and need to be exempt from an approval workflow. Users that are subject to approvals are added into Buyer Groups. Buyer Groups created under the Parent (i.e. District) account will allow any user to be added to the group. The need for Buyer Groups is less common.

Example:

At North Street High School, teachers for grades 9th-10th submit their carts to Violet Gray, the Secretary for the 9th-10th grade. In addition, teachers for grades 11th- 12th submit their carts to Janice Emmons, the Secretary for the 11th-12th grade. In this example, two sets of Buyer and Approver Groups would be needed, each with their own Approval Condition level.

Approval Level 1:

- Buyer Group 1: 9th-10th Grade Teachers -BG
- Approval Group 1: 9th-10th Grade Secretary -AG
- Approval Condition: Buyer Group "9th-10th Grade Teachers -BG" carts are approved by Approver Group "9th-10th Grade Secretary -AG"

Approval Level 2:

- Buyer Group 2: 11th-12th Grade Teachers -BG
- Approval Group 2: 11th-12th Grade Secretary -AG
- Approval Condition: Buyer Group "11th-12th Grade Teachers -BG" carts are approved by Approver Group "11th-12th Grade Secretary -AG"

Approval Level 1
Rules Last Modified 11/14/2023 by District Administrator

When Buyer Group = **9th-10th Grade Teachers- BG**
It needs approval from one of the following: **9th-10th Grade Secretary -AG**

Approval Level 2

When Buyer Group = **11th-12th Grade Teachers -BG**
It needs approval from one of the following: **11th-12th Grade Secretary - AG**

Then submit to School Specialty for Purchase

How To Create Buyer and Approver Groups

- Under **My Dashboard,** select **User Groups** then click the **ADD USER GROUP** button.
- Add a Group Name (append -AG for approver group or -BG for buyer group).
- Select Approval Group or Buyer Group.
- Select the organization for the group (use the account location of the approver, e.g., School or District).
- Click **CREATE GROUP.**

Add User Groups
Choose to add a single user group at a time or upload a spreadsheet of user groups below.

‹ Back to User Groups Administration

Single Entry	Bulk Upload

Group Name *

⦿ Approval User Group
◯ Buyer User Group

Select Your Organization

ECOMMERCE TEST SCHOOL DISTRICT ⌄

CREATE GROUP

- Click the Buyer Group or Approver Group Name to add users.

User Groups | ECOMMERCE TEST SCHOOL DISTRICT

ADD USER GROUP

ACTIONS

1 User Groups

Group Name ⇕	Assigned Users	Location ⇕	Type
New Ecom Admin - AG	New Ecom Admin	ECOMMERCE TEST SCHOOL DISTRICT	Approver Group

- Search by name or click the Search button to see all available users.
- Click the name of each user to add them to the group.
- Click **ADD USER.**

New Ecom's
User Groups ⌄

New Ecom ES - BG Buyer Group ✎ Edit

Add Members

Search new ecom 🔍

Select User Account ✕

Select the user account from the list of matching user accounts and click 'Add User'.
Matching User Accounts:

New Ecom Approver, Newecomapprover
New Ecom Buyer, Newecombuyer

ADD USER

1 Users

ACTIONS

Full Name	Location		Role
New Ecom Shared User Staff	ECOMMERCE TEST ELEMENTARY SCHOOL	websupport@schoolspecialty.com	Buyer Shared User

How To Create Approval Conditions For Approver and Buyer Groups

Once Approver Groups or Buyer Groups are created, you can create your Approval Conditions for them.

- Go to **My Dashboard,** then select **Account Locations.**
- Choose the location you would like to view the Approval Conditions for by selecting **View Details.**
- Click **ADD/EDIT RULES.**

- Set the Approval Levels in corresponding order to the Approver Group.
  - Create rule(s) of Approval Levels by Cart Values, Payment Type, Items from Category, Buyer Group, Billing, and/or requirements of Budget Code or PO Number.
  - Click **SAVE RULES** to complete.

ProTip! Approval Conditions are normally created at the location level. However, if a location does not have Approval Conditions set, the system will revert to the Approval Conditions set up at the Parent (i.e., District) account. Rules will be applied in order from the top. Any Approver Users in a Buyer Group should have their Approval Level condition listed prior to the Buyer Group condition.

Bulk Uploading Users or User Groups

When many users or user groups need to be created, **Bulk Upload** may be more efficient than adding one by one.

> • Click **Bulk Upload**, and select **Download Template** under the corresponding sections.

> • Fill in the required fields as listed from the formatted templates.

Protip! To find your Location EIDS or OrgEIDs, go to **My Dashboard,** select **Account Locations,** and use the number in parentheses next to the location name.

> • Save to your system as a .csv file format.
> • Return to **Bulk Upload**, select your document, and choose **UPLOAD LIST.**
> • Watch for the Upload Status to be updated to Complete, then **View Logs** for any failures.

Approving or Rejecting Carts

Approving Carts

- Click **My Dashboard** then, **Carts to Approve**. Your cart(s) to approve will display.
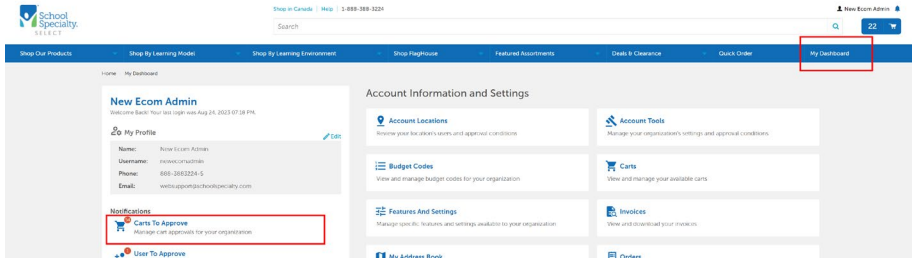
- Choose the **Cart Filters** option to narrow your search by Last Updated (Date) Range or by Ship To Location. Sort your list by the **Status, Creator, Payment,** or **Ship To** columns.

For quick options:

- Use the dropdown arrow for quick-view to approve/reject/modify PO#, Budget Code, or Shipment Date.

- Or, click the **ACTIONS** button to approve/edit and add payment/reject/print multiple carts.
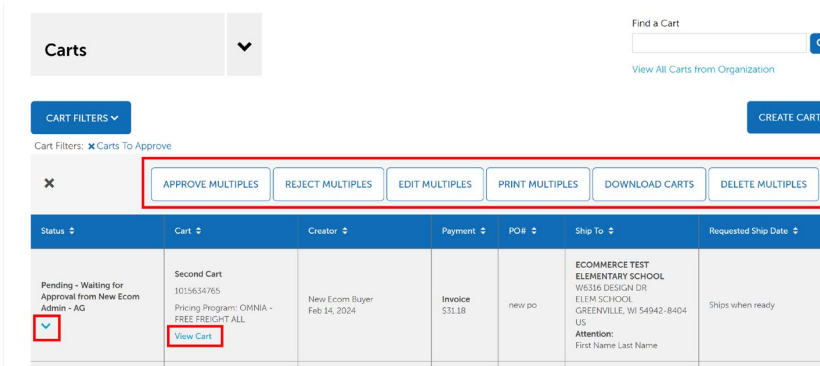
Approver Cart Modifications

- Click **View Cart** under your shopping cart number to view cart details.
- Choose **CHANGE** to update Requested ship Date or edit/add Payment.
- Select **EDIT** to modify Items/Quantities, Pricing Program, Ship-To Location/ Attention-To, Requested Ship Date, Payment Method, PO Number, or Budget Codes.

IMPORTANT! For Credit Card users, please ensure the selected Billing Address matches the Credit Card Billing.
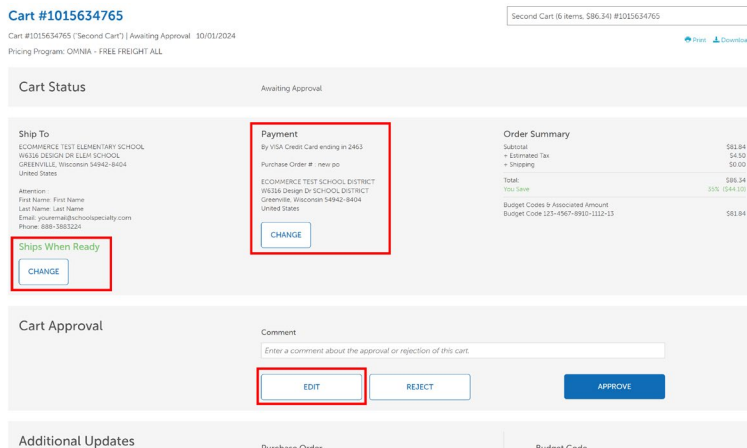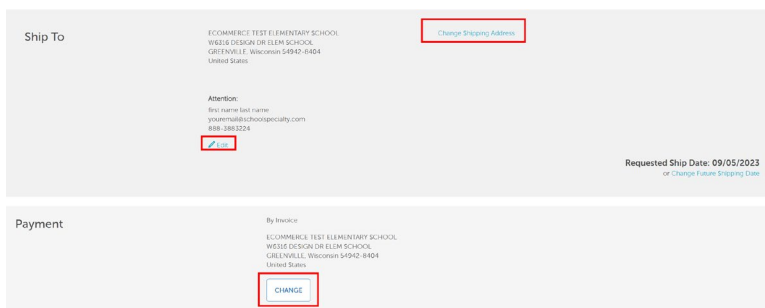
Editing Details

- From selecting **EDIT**, view the full cart editing options:
    - Apply an alternate pricing program.
    - Add items, update quantities, or remove items.
   - Take advantage of Save Now deals to replace an item and save your budget.
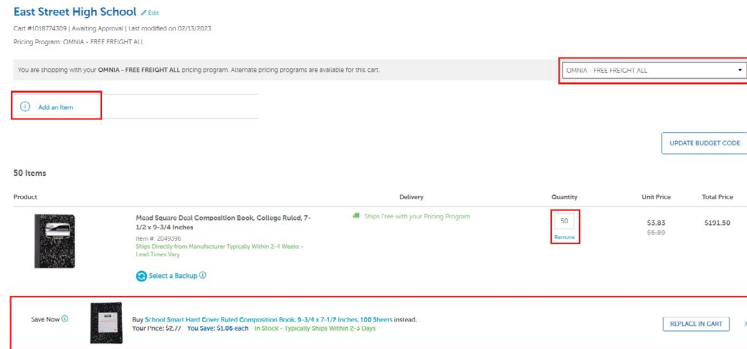
- Correct the Attention To and/or Shipping location.
- Change the payment method or Billing Address.

Rejecting Carts

- Carts can be rejected by clicking the **REJECT** button, through **View Cart**, or by using the dropdown arrow for quick-view. You can reject multiple carts under the **ACTIONS** button by selecting the desired carts and clicking **REJECT MULTIPLES.**
- If rejecting cart, enter a comment about the rejection of the cart.
  Click **SAVE AND REJECT.**
- The Creator of the cart will be notified of the rejection via an email which will include your Reason for Rejection comments.
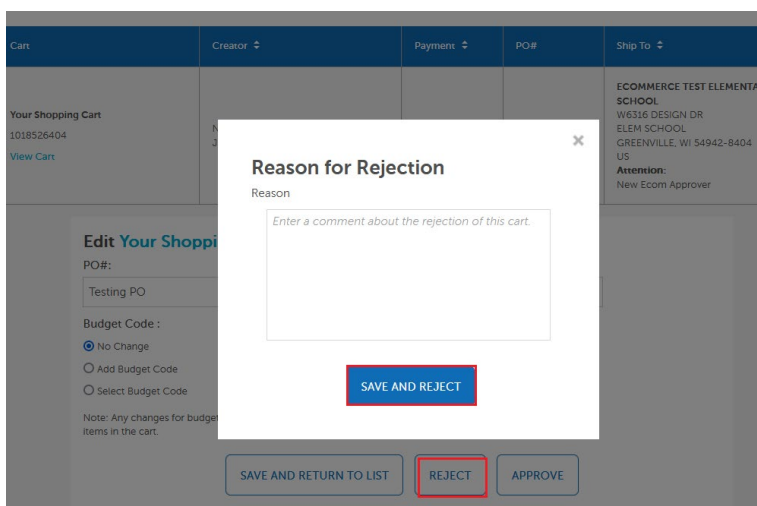
Reviewing Order Status, Tracking, and Invoices

## Accessing Orders or Invoices:

- Click **My Dashboard** to be able to select:
    - **Orders** to view order history, track your orders, and more.
    - **Invoices** to locate, view balances, and download your invoices individually or by multiples of 20.
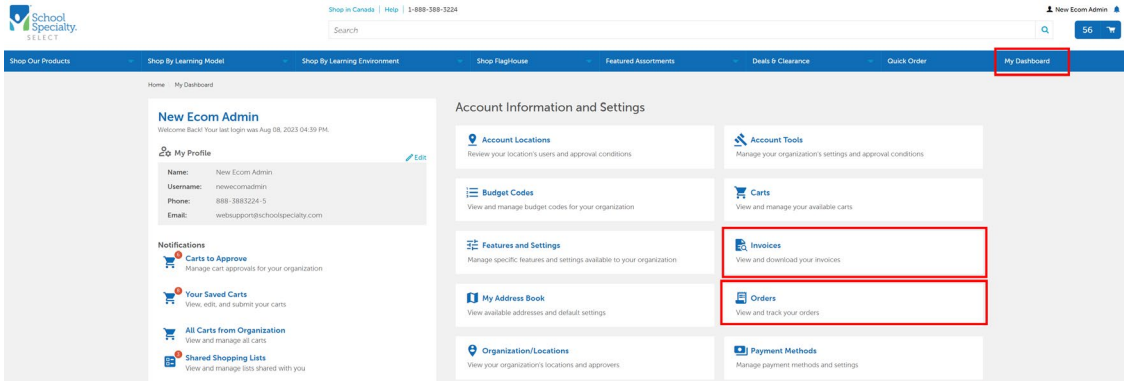
Accessing Orders and Order History:

- From **Orders,** your order(s) will display showing the order number, order creator, payment, PO number, shipping location, ship date, and status.
- Use the Filters or Search by to narrow down your results.
    - Filters will allow you to apply filters by Date, Full or Partial PO #, and/or the Ship To Account.
    - Search by will allow you to locate your order by Order # or Invoice #.
- Click on an **order number** to view order details and options.

IMPORTANT! Your filters and search options will be based on your user setup. Buyers and Shared Users will only be able to view their own orders placed online, Approvers will be able to view in addition to their own, all online orders within their approval workflow. Lastly, Administrators can view all orders from their organization.
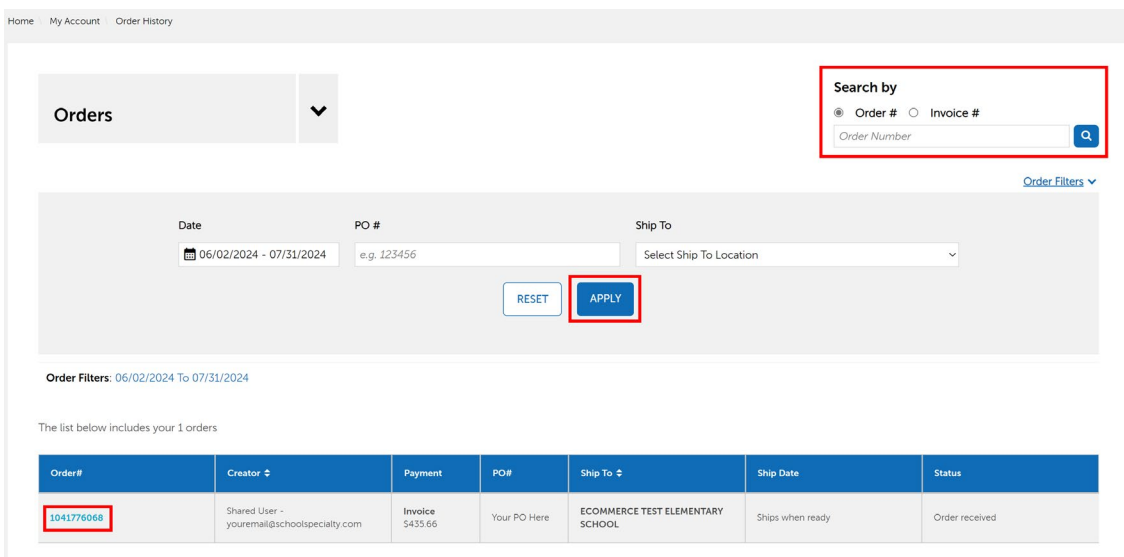
In the Order:

- Items from the order will be listed as shipped with their tracking number or indicate they are awaiting shipment.
- Click **ACTIONS** to Reorder, Copy items into your Current Cart, or Save items to a Shopping List.
- Click the **tracking number** to view delivery dates and signatures or obtain Proof of Delivery.
- Click **View History** to view dates and users who submitted, reviewed, and modified the cart before submitting as an order.
- **Print** to print a copy of the order.
- Select **Download Invoices** to view and print a PDF of all invoices related to the order.

Order #103258

Cart 1032588815 ("Your Shopping Cart") ☰ View History

⤓ Download Invoices   🖨 Print

Order Status   Order shipped

Ship To	Payment	Order Summary	
School House Rock Academy	By Invoice (30 NET)	Subtotal:	$262.26
123 School House Lane	Purchase Order # : 23042	+ Estimated Tax:	$0.00
Rocking WI		+ Shipping:	$39.34
US 12345-6789		+ Handling Charge:	$0.00
	School House Rock Academy		
Attention:	123 School House Lane	Order Total:	$301.60
First Name: ARIA	Rocking WI 12345-6789		
Last Name: SONG	United States		
Email: ASong@SchoolofRockAcad.org		Order Refund Total:	($0.00)
Phone: 123-8675309			
Ships When Ready			

✖ RE-ORDER   COPY ITEMS TO CURRENT CART   SAVE AS LIST

1 Item

Product	Quantity	Unit Price	Total Price
Shipped on 2023/04/04			
Childcraft ABC Furnishings All Over Rainbows Carpet, 6 x 9 Feet, Rectangle Item #: 2091571	1	$262.26	$262.26
Shipping Details Tracking Number: **6182167**			

Accessing Invoices:

- From selecting **Invoices** on **My Dashboard,** your invoice(s) will display showing an option to select the line or "All" lines from the current page, the Invoice #, Invoice Date, Invoice Amount, Open Balance, Order#, and PO#.

- Use Filters to search by Date, the Invoice Amount, or PO Number. Alternatively, use Search by to locate by just the Invoice# or Order#. Searches with the PO Number can be by the full number or partial numbers.

- To download an invoice select the invoice number. To download multiple invoices, check up to 20 lines, select **ACTIONS,** and then **Download Invoices.** A PDF document of your selected invoices will be downloaded for printing.

- To download an excel copy of your filtered list, click **ACTIONS** then **Download Filtered Invoice List.**

- To see the order details, select the Order#.

IMPORTANT! If you have a larger account, you may need to filter down your Date range. The max search date range is 60 days and within the past 18 months.

Additional Features For Administrator Access Only

If you are an Administrator, see below for additional features:

- Filter your order or invoice search by "Mine" or "All." Choose date ranges, PO Numbers and Ship To Locations. Only Administrators can see all orders and invoices under their organization.

- From **Orders,** you can select **ACTIONS** to choose from the following:
  - **View All Orders from Organization** to show you all the orders within the last 18 months.
  - **Download All Organization Orders** to download all your organization orders to an excel sheet.
  - **Download Filtered Order List** to download to an excel sheet only those orders from your chosen filtered selection.

IMPORTANT! If you have a larger account, you may need to filter down your Date range. The max search range is 60 days and within the past 18 months.

Password Reset

Self-Service Reset:

- Visit **select.schoolspecialty.com** (U.S. customers) or **select.schoolspecialty.ca** (Canadian customers) and select **Forgot Password?** underneath Sign In to Your Account.

ProTip! If you have also forgotten your username, please select **Forgot Username?** first to locate it by your email address.
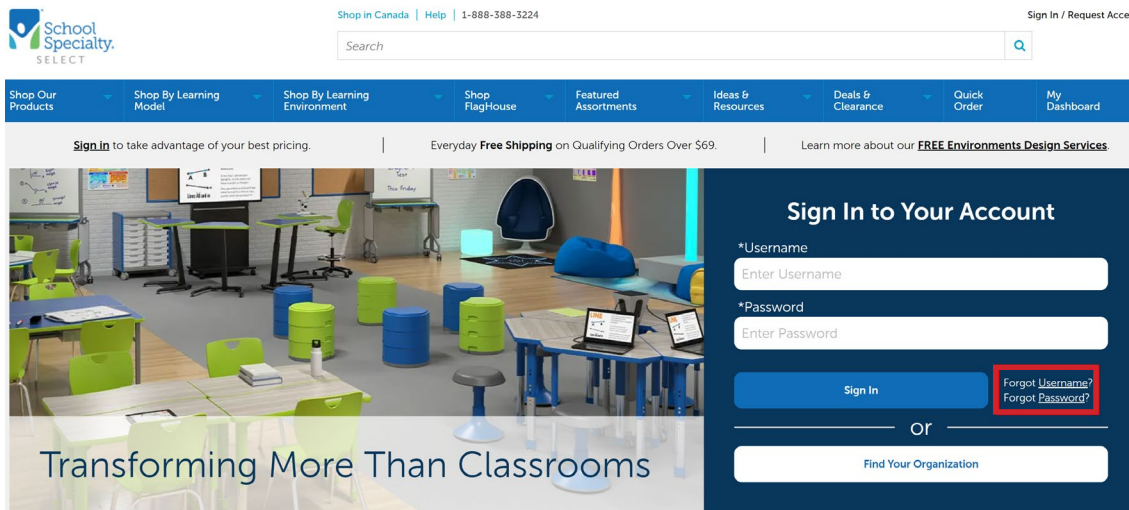
- Type in your username and click **SEND ME MY VALIDATION CODE.**
- Go to your email and copy your validation code.
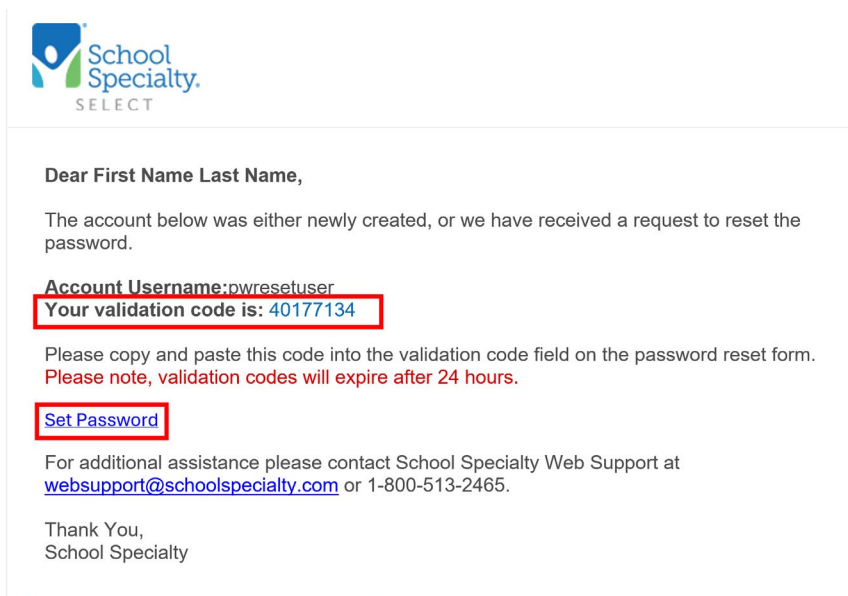
- Return to your "Forgot Password" screen, type or paste your validation code, then type your new password in both the New Password and Verify Password boxes. If this screen was closed, use the **Set Password** email link to return.

- Select **Change Password**. You are now able to sign in with your username and new password.

IMPORTANT! Passwords must be at least 8 characters long, contain at least 1 letter and 1 number, and are case-sensitive.

Forgot your password?

Let us help you
An email has been sent to the email address associated with the provided username with further instructions. Please note, validation codes will expire after 24 hours.

Validation code:

40177134

New password:
Passwords should be at least 8 characters long, contain at least 1 letter and 1 number and are case-sensitive.

••••••••

Verify password:

••••••••

CHANGE PASSWORD

Administrator Password Reset Access

Users with Administrator Access are able to trigger a password reset email for any user. The email sent to the user contains links and instructions for them to reset their password.

IMPORTANT! The Validation Code will expire after 24 hours. If the code has expired, the user will see instructions on how they can request a new code.

- Login under your administrative credentials.

- Select **My Dashboard** and then **Users.**

- Select the full name of the user. Search by name or filter by Location.

- Click **FORCE PASSWORD RESET.**

ProTip! If the user's profile contains incorrect information scroll down to the Contact Information to update and **SAVE CHANGES** prior to selecting **FORCE PASSWORD RESET.**

Shared or Group User Reset (Administrators Only)

Shared User logins, where a single username and password is shared by staff in one location or department are often used to create carts that route to a designated Approver. Only users with Administrator Access can trigger the password reset for these users.

IMPORTANT! Attempts to reset a shared user password through the "**Forgot Password?**" link will fail with a message of **"You are a member of a shared user account, please contact your Administrator to reset your password."**

- Sign in under your administrative credentials.
- Select **My Dashboard** and then **Users.**
- Find the Shared User for which you need to reset the password for. Search by name or filter by Location. The user will be listed with the Shared User Role. You will also see the Email Address associated with the user. Click the **Shared User** name.

Full Name ⇕	Username	Email Address	Roles ⇕	Location ⇕
First Name Last Name Active	pwresetuser	youremail@schoolspecialty.com	Buyer	ECOMMERCE TEST SCHOOL DISTRICT
Location Or Dept Name Staff Active	sharedpwreset	youremail@schoolspecialty.com	Buyer Shared User	ECOMMERCE TEST SCHOOL DISTRICT

- If you would like to send the password reset information to the email associated with the user, click **FORCE PASSWORD RESET**. This will trigger an email to be sent to the email address associated with the account, which will include links and instructions for them to reset their password.

IMPORTANT! **The Validation Code will expire after 24 hours.** If the code has expired, another **FORCE PASSWORD RESET** will be necessary.

- If you would like to change the email address associated with the user, scroll down to view the email listed under Contact Information, update the email, and click **SAVE CHANGES**. Then click **FORCE PASSWORD RESET**.

ProTip! We recommend you associate the email address of the Shared User's designated Approver with the sign-in.

Contact Information

Username: *
sharedpwreset

First Name *
Location or Dept Name

Last Name *
Staff

Email Address *
youremail@schoolspecialty.com

Phone Number *
(800) 5132465 Ext.

Gender:
Select one

Mobile Phone Number:

Birthday   Privacy Policy
Year

Month
--
Date
--

SAVE CHANGES

If you need additional support from Customer Care for anything, you can always go to **Select.SchoolSpecialty.com** and click **Help** or **Chat**. Or call us at **888.388.3224**