

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 startup 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.

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Signing In

Sign In to You	ir Account
*Username	
Enter Username	
*Password	
Enter Password	
Sign In	Forgot <u>Username</u> ? Forgot <u>Password</u> ?
or	
Find Your Orga	nization

- Visit <u>select.schoolspecialty.com</u> (U.S. customers) or <u>select.schoolspecialty.ca</u> (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.



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.

School Specialty.		Shop in Canada Help 1-888-388 Search	3-3224					1 No	w Ecom Admin 🛕
SELECT Shop Our Products	 Shop By Learning Model 	Shop By Learning Environment	- Shop FlagHouse	 Featured Assortments 	👻 Deals & Clearance	n	Quick Order	My Dashboard	
	HS Science Budy Cart (037376526 Last modif Pricing Program: OMNIA - FR	get ∕Edik led on 08/24/2023 EE FREIGHT ALL			Other Saved C	Carts Noad	×		
	Prices are subject to change i	n saveu carts.			LETE CART BUDGET CODES C	OPY TO NEW CART	IS LIST SAVE CART		
	You are shopping with your	OMNIA - FREE FREIGHT ALL pricing program. Alternate	pricing programs are available for this cart.		OMNIA - FREE	FREIGHT ALL			
	Product	LCD Digital Microscope II Ren #: 218136 Ships Directly from Manufacturer Typically Wi	thin 2-4 Weeks -	Delivery Ships Free	Quantity 1 Remove	Unit Price \$299.95	S299.95		
		MOVETO LIST			Bi	• N udget Code: 123-4567-8910-1	o Other Discounts Apply		

- 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.

School Specialty.		Shop in Canada Help 1-888-388-3224 Search			L New Ecom Admin 🗍
Shop Our Products	Shop By Learning Model Sho	pp By Learning Environment 💎 Shop FlagHouse	Featured Assortments	Deals & Clearance 🛛 👻 Quick Order	My Dashboard
	HS Science Budget Cart 1036683311 Last modified on 08/24/2023 Pricing Program: OMNIA - FREE FREIGHT ALL Prices are subject to change in saved carts. You are shopping with your OMNIA - FREE FREIGHT	ALL pricing program. Alternate pricing programs are available for this cart.		Other Saved Carts	
	Thank You	Your order has been submitted.		CHANGE CART CONTINUE SHOPPing Your car has been updated to the next saved cart. You can continue shopping or change your current cart.	
	2 Items				



Managing Users (For Administrator Use Only)

Accessing Your Users

• Under My Dashboard, click on Users to see the listing of the current users.

Sahaal		Shop in Canada Help 1-88	3-388-3224				1 Nev	Ecom Admin 🌲
Specialty.		Search					Q	20 🐨
Shop Our Products	Thop By Learning Model	Shop By Learning Environment	 Shop FlagHouse 	Featured Assortments	Deals θ Clearance	- Quick Order	My Dashboard	
	Home My Dashboard							_
	New Ecom Admin		Account Information	on and Settings				
	20 My Profile	r. ∕Edit	Account Locations	nd approval conditions	Account Tools Manage your organization's setting	is and approval conditions		
	Name: New Ecom Admin Username: newecomadmin Phone: 888-3683224-5 Email: websupport@schoolspecialty.com		Eudget Codes	es for your organization	Carts View and manage your available ca	ints		
	Notifications Carts To Approve Manage cart approvals for your organization		Features And Settings Manage specific features and s	settings available to your organization	Rev and download your invoices			
	Manage requests awaiting your approval		My Address Book	sefault settings	Orders View and track your orders			
	View, edit, and submit your carts All Carts From Organization View and manage all carts		Organization/Location View your organization's location	ns ions and approvers	Payment Methods Manage payment methods and set	tings		
	Your Rejected Carts Review Your Rejected Carts Shared Shopping Lists View and manage lists shared with you		Purchase Orders Set up a blanket purchase order	er and assign to users	Shopping Lists View, create, share and shop from	your lists		
	and a second secon		+ User Account Request Review, approve or reject new	ts user account requests for your organization	User Groups Create and edit your organization's	s user groups		
			Lusers View and manage your organia	zation's 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.

New Ecom's Users	*				Find a User See Users in Locatior	٩
Users ECOMMERCE TEST SCHOO	DL DISTRICT				ALL	ADD NEW USER(S)
Select all			PERMISSIONS/RESTRICTIONS	DELETE USER(S)	DOWNLOAD LI	ST USER REPORT CLOSE
Full Name 🕈	Username	Email Address		Roles ‡		Location ¢
New Ecom Buyer Disabled ENABLE	newecombuyer	websupport@schools	pecialty.com	Buyer		ECOMMERCE TEST ELEMENTARY SCHOOL
New Ecom Admin Active	newecomadmin	websupport@schools	pecialty.com	Buyer Buyer Administrator		ECOMMERCE TEST SCHOOL DISTRICT

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.

		Bulk Upload	
* Dominant Galife			
* Required helds Account *			
Search for an account for this user.		Account Search	
Ship to address * ECCOMERCE TEST MIDDLE SCHOOL W6316 Design Dr Greenville, WI 54942-8404 (+21 More)		Select shipping address	
Username: *		Email Address *	
First Name *		Last Name *	
Phone Number #			
	Fxt		
· · · · · · · · · · · · · · · · · · ·	EAL		
User Groups		User Group Search	
Role (i)		Shared User ①	
T I I WINDOW		La onered oser	
Approver		D	
Administrator		Permissions / Restrictions (1)	
Administrator		Permissions / Restrictions ③ Add PO# Restricted Bill to District Restricted	
Administrator		Permissions / Restrictions ③ Add PO# Restricted Bill to District Restricted Bill to Location Restricted	
Approver Administrator		Permissions / Restrictions ① Add POIR Restricted Bill to District Restricted Bill to Location Restricted Bill to Location Restricted	
Approver Administrator		Permissions / Restrictions ① Add POR Restricted Bill to District Restricted Bill to Location Restricted Bill to Location Restricted Credit Code Entry Restricted Credit Card Restricted	
Approver Administrator		Permissions / Restrictions ① Add POP Restricted Bill to District Restricted Bill to Location Restricted Credit Code Entry Restricted Credit Card Restricted Invoice Restricted New User Fmail Notifications Restricted	
Approver		Permissions / Restrictions ① Add POIR Restricted Bill to District Restricted Bill to Location Restricted Credit Corde Entry Restricted Credit Card Restricted Invoice Restricted New User Email Notifications Restricted Override Product Catalog Filter Permitted	
Approver Administrator		Permissions / Restrictions ① Add POIR Restricted Bill to District Restricted Bill to Location Restricted Bill to Location Restricted Credit Card Restricted Invoice Restricted New User Email Notifications Restricted Override Product Catalog Filter Permitted Save Credit Card Restricted	
Approver Administrator		Permissions / Restrictions ① Add POIR Restricted Bill to District Restricted Bill to Location Restricted Bill to Location Restricted Credit Card Restricted Credit Card Restricted New User Email Notifications Restricted Override Product Catalog Filter Permitted Save Credit Card Restricted Reguire Email Address for PunchOut Notifi	ation

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.

ist below includes i	III 1 User Account Requests.			
Full Name	Emak	Organization 0	Notes	Req. Date 0
st Name Last Name	teacher@school.com	ECOMMERCE TEST SCHOOL DISTRICT	I want to order my classroom supplies!	09/30/2024
Approve or	Reject First Name Last	Name		~
Approve or	Reject First Name Last	Name	or Note	~

• 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 > 50.00 It needs approval from one of the following: East School Bookeeper- 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 \$	Туре
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

Then submit to School Specialty for Purchase

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

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 spreads Back to User Groups Administration	heet of user groups below.	
	Bulk Upload	
Group Name *		
Approval User Group O 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 ECOMMERC	E TEST SCHOOL DISTRICT		ADD USER GROUP
Group Name 🗢	Assigned Users	Location +	Туре
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 ES - BG Buyer Group Zear Select User Account X Add Members Select the user account from the list of matching user accounts and click: Xid User. X Search new ecom Q Matching User Accounts: 1 Users New Ecom Byzer, New ecom byzer.	
ADD USER	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.

5	168	User Groups	Purchase Orders 6	Budger Codes 13
> View Locations	> Manage Users	> Manage User Groups	> Manage Purchase Orders	> Manage Budget Codes
pproval Conditions				
pproval Conditions	sers at ECOMMERCE TEST SCHOOL DISTRICT IN	ocation.		ADD/EDIT RILLES
pproval Conditions e approval conditions specified below apply to the us xe: Rules specified below are applied in order from th	sers at ECOMMERCE TEST SCHOOL DISTRICT in the top.	ocation.		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.

	Rules specified below are applied in order from the top.	
Poert TEST HIGH SCHOOL It needs approval from one of the following: East School Office × Co To Lister Groups Poert TEST HIGH SCHOOL	isert Approval Level	
	proval Level 1	
It needs approval from one of the following: East School Office X Oo To User Group Ind a User Group And requires Diadget Code P P Number PORT TEST HIGH SCHOOL Construction of the following: Diartic Office X Construction of the following: Diartic Office Constructions Construction of the following: Diartic Office Constructions		Remove Approval Level
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Co To User Groups Find a User Group Find a User Group And requires Budget Code PO Number	Cart Value > 0	East School Office 🗙
Find a User Group And requires Budget Code P P0 Number Remove Approval Level It needs approval from one of the following: Destrict Office X Go To User Group Find a User Group It needs approval from one of the following: Destrict Office X Go To User Group Image: Destrict Office X	Add a condition	Go To User Groups
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And requires Budget Code P Number		
Budget Code P P Number Remove Approval Level It needs approval from one of the following: Diartic Office X Corrous Form a User Groups Go To User Groups And requires BudgetCode P O Number		And requires
O FO Number O FO FO Number O FO FO Number O FO F		U Budget Code
It needs approval from one of the following: PORT TEST HIGH SCHOOL PORT TEST PLAYGROUND Co To User Groups Find a User Group C And requires BudgetCode PO Number	vevel evel 2	
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PPORT TEST PLAYGROUND Go To User Groups Find a User Group And requires BudgetCode D D Number	proval Level 2	Remove Approval Level It needs approval from one of the following:
Find a User Group	Iner an order has:	Remove Approval Level It needs approval from one of the following: District Office X
And requires BudgebCode D Number	/hen an order has: Billing WEB SUPPORT TEST HIGH SCHOOL Cart Value WEB SUPPORT TEST PLAYGROUND	Remove Approval Level It needs approval from one of the following: District Office * Go To User Groups
And requires UBudgetCode UPO Number	Image: Support Test High School Billing Carl Value Payment Type	Remove Approval Level It needs approval from one of the following: District Office X Go To User Group Find a User Group
BudgetCode DO Number	Vhen an order has: Billing Cart Value Payment Type Itoms from Category Buere Group	Remove Approval Level It needs approval from one of the following: District Office X Go To User Groups Find a User Group Q
C FONDING	Vhen an order has: Billing Cart Value Payment Type Items from Category Burger	Remove Approval Level It needs approval from one of the following: District Office × Go To User Groups Find a User Group And requires
	web support test High School Biling Cart Value Payment Type Lines from Category Biling	Remove Approval Level It needs approval from one of the following: District Office × Go To User Groups Find a User Group Q And requires BudgePCode DBudgePCode DBudgePCode
	web support test High school Billing Oweb support test High school Cart Value Payment Type District	
	Invoval Level 2	Remove Approval Level It needs approval from one of the following: District Office × Go To User Groups Find a User Group And requires BudgePCode PO Number
ase	When an order has: Billing WEB SUPPORT TEST HIGH SCHOOL Carr Value WEB SUPPORT TEST PLAYGROUND Payment Type WEB SUPPORT TEST PLAYGROUND Billing USER Carbon Billing USER SUPPORT TEST PLAYGROUND Billing USER Carbon Billing US	Remove Approval Lavel It needs approval from one of the following: District Office X Go To User Group Find a User Group And requires DedgeRCode PO Number

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.

Add User Groups Choose to add a single user group at a time or upload a spreadsh < Back to User Groups Administration	eet of user groups below.	
Single Entry	Bulk Upload	
Add multiple users by uploading an excel document Do The status of your upload will be displayed in the logs b	ownload Template elow.	
Browse		UPLOAD LIST

• 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.

File	Home Ins	ert Draw Page Layo	out Formulas Data	Review View Automat	e Help A	crobat			
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	Clipboard	Font	L ²	Alignment r	Number	L2	Ĩ	Style	es
A1	· · · ·	× ✓ ƒx Location	TEID						
	А	В		С			D		E
1	LocationEID	UserGroupName	UserGroupType (Bu	uyerGroup or Approver	Group)	AssignedUserr	ames (se	parated by ;)	
			F 7F \-	· · · · · ·					

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File	Home Insert	Draw Page Layout F	ormulas Data Review V	'iew Automate Help	Acrobat		
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	A	В	С	D	E	F	G
1	OrgEID	LOGONID	FIRSTNAME	LASTNAME	EMAIL1	PHONE1 (###-#######)	BuyerAdministrator (Y/N)
_							

- 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.

Sir	ngle Entry			
Add multiple users The status of your	s by uploadir upload will	ng an excel docum be displayed in the	ent. Download Templa logs below.	te
Browse				
FILE NAME		UPLOAD STATUS	UPLOAD TIME	LOGS
UserGroupsUplo	oad (1).csv	Complete	3/24/23 11:44 AM	Close Logs
	Start Time	:	3/24/23 11:44 AM	
	End Time:		3/24/23 11:44 AM	
	No. of line	es succeeded:	1	

Approving or Rejecting Carts

Approving Carts

• Click **My Dashboard** then, **Carts to Approve**. Your cart(s) to approve will display.

School Specialty.		Shop in Canada Help 1-888 Search	1-388-3224			L New Ecom Admin 🗍
Shop Our Products	 Shop By Learning Model Shop 	o By Learning Environment	Shop RegHouse	 Featured Assortments 	Deals & Clearance Guick Order	My Dashiboard
	Home My Dashboard					
	New Ecom Admin Vectore Back Your bit toph was Aug 24, 2023 07 (8 PM, Zo My Profile Name: New Vectore Admin Vectore Admin	∕ ta:	Account Information	on and Settings	Account Tools Manage your exploration's settings and approval conditions	
	Phone: 886-3863224-5 Email: websappon@schoolspecialty.com		Usew and manage budget code	es for your organization	Carts View and manage your available carts	
	Notifications Carts To Approve Manage cart approvils for your organization		Features And Settings Manage specific features and s	ettings available to your organization	Invoices Were and download your invoices	
			Mu Liddrans Book		E Orders	

• 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.

Carts	~				Find a Cart View All Carts f	from Organization
CART FILTERS ~	ove					CREATE CAR
× [APPROVE MULTIPLES	EJECT MULTIPLES ED		PRINT MULTI	PLES DOWNLOAD CARTS	DELETE MULTIPLES
Status 🗢		Creator 🗢	Payment 🗢			Requested Ship Date 🗢
Pending - Waiting for Approval from New Ecom Admin - AG	Second Cart 1015634765 Pricing Program: OMNIA - FREE FREIGHT ALL	New Ecom Buyer Feb 14, 2024	Invoice \$31.18	new po	ECOMMERCE TEST ELEMENTARY SCHOOL W6316 DESIGN DR ELEM SCHOOL GREENVILLE, WI 54942-8404 US Attention:	Ships when ready

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.

Cart #1015634765 Cart #1015634765 (Second Cart) Availing Approval 10/01/2024 Pricing Program: OMNIA - FREE FREIGHT ALL		Second Cart (6 items, \$86.34) #1015634765	Print ± Cownload
Cart Status	Awaiting Approval		
Ship To LCCOMMENT THE ILLIMATION SHOOL, WISE DESCRIPTION ILLIMATION CONTINUES MARKED AND AND AND AND AND MARKED AND AND AND AND MARKED AND AND AND AND MARKED AND AND AND AND MARKED AND AND AND AND AND MARKED AND AND AND AND AND AND MARKED AND AND AND AND AND AND MARKED AND AND AND AND AND AND AND MARKED AND AND AND AND AND AND AND AND MARKED AND AND AND AND AND AND AND AND AND MARKED AND AND AND AND AND AND AND AND AND AN	Payment By 11G Accel and any a 2463 Fundass Other # Ana go Consequent prime and a consequence makes any or School Content makes any or School Content unless States CHARCE	Order Summary Joachi - Eannes Tai - Soageng Tool - Tool -	581.84 54.50 598.34 3555 (244.10) 591.94
Cart Approval	Convent Enter a comment about the approval or rejection of this cart. EDIT REJECT	APPROVE	
Additional Updates	Purchase Order	Budget Code	

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.

u are shopping with your OMI	NIA - FREE FREIGHT ALL pricing program. Alternate pricing programs are avai	lable for this cart.	OMNIA - FREE	FREIGHT ALL	
) Add an Item				UPDA	NTE BUDGET CO
uct	Mood Sauree Dool Compacting Back: Collope Build T-	Delivery	Quantity	Unit Price	Total Price
9	1/2 x 0-3/4 Inches Item # 2049/996 Ships Directly from Manufacturer Typically Within 2-4 Weeks - Lead Times Vary		Remove	\$3.83 \$5.89	\$191.50
	Select a Backup (I)				

- Correct the Attention To and/or Shipping location.
- Change the payment method or Billing Address.

Ship To	ECOMMENT THE FEMALINARY SOLOOK, WEST DESCENDENT OF LIP SOLOOK, GETERMET, Felorensing SOLO - 104 Unata Solasi Analonia Manala International Solasi Manala International International Solasi Manala International Int	Requested Ship Date: 09/05/2023 or Output Insue Dates Date
Payment	By Innoce ECOMMERCE HER ILLMENTMAY SCHOOL WEED GENOR DI ELLMENTOC CELLVALL, WINCOM SHOR HADA Dawe States CHANNE	

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.

Cart		Creator 🗘	Payment 🗢	PO#		Ship To 🗘
Your Shopping (1018526404 View Cart	Cart	Reason for Rej	ection		×	ECOMMERCE TEST ELEMENTAP SCHOOL W6316 DESIGN DR ELEM SCHOOL GREENVILLE, WI 54942-8404 US Attention: New Ecom Approver
	Edit Your Shop PO#: Testing PO Budget Code :	Enter a comment abc	ut the rejection of t	his cart.		
	 No Change Add Budget Code Select Budget Code Note: Any changes for bud items in the cart. 	SAVE	AND REJECT			
		SAVE AND RETURN TO LIST	REJECT	APPROVE		

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.

School Specialty.		Shop in Canada Help 1-888-38 Search	8-3224		L New Ecom Admin 🛔
Shop Our Products	 Shop By Learning Model Shop 	By Learning Environment	 Shop FlagHouse Featured Assortment 	ints Deals & Clearance Oulck Order	My Dashboard
	Home My Dashboard				
	New Ecom Admin		Account Information and Settings		
	Welcome Back! Your last login was Aug DB, 2023 04:39 I	PM. 🖉 Edit	Account Locations Review your location's users and approval conditions	Account Tools Manage your organization's settings and approval conditions	
	Name: New Ecom Admin Username: newscomadmin Phone: 888-3883224-5 Email: websupport@schoolspeciality.com	n	Budget Codes View and manage budget codes for your organization	Carts View and manage your available carts	
	Notifications Carts to Approve Manage cart approvals for your organization	n	Features and Settings Manage specific features and settings available to your organizat	tion View and download your invoices	
	Your Saved Carts View. edit. and submit your carts		Wy Address Book View available addresses and delault settings	Corders View and track your orders	
	All Carts from Organization Wew and manage all carts Shared Shopping Lists Wew and manage lists shared with you		Organization/Locations View your organization's locations and approvers	Payment Methods Manage payment methods and settings	-

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.

My Account Order Histor	У						
Orders		~				Search by Order # O Order Number	⊃ Invoice #
							<u>Order Filters</u> ~
	Date	PO #			Ship To		
	m 06/02/2024 - 07/31/3	2024 e.g. 12	3456		Select Ship To Locat	ion	~
				RESET	APPLY		
Order Filters: 06/02/202	4 To 07/31/2024						
The list below includes you	ır 1 orders						
Order#	Creator 🗢		Payment	PO#	Ship To ≑	Ship Date	Status
1041776068	Shared User - youremail@school	lspecialty.com	Invoice \$435.66	Your PO Here	ECOMMERCE TEST ELEMENTARY SCHOOL	Ships when ready	Order received

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 Car	t") = View History					± Downloa	d Invoices 🖷 Print
Order Status orde	r shipped						
Ship To School House Rock Academy 123 School House Lane Rocking Wi US 1234-5789 Attention: First Name: ANA Leat Name: SONG Email: ASong@School@RockAcadog Phone: 123-0675309 Ships When Ready		Payment By Invoice (30 NET) Purchase Order # : 23042 School House Rock Academy 123 School House Lane Roching Wi 1243-6-789 United States		Order Summary Subotal: + Estimated Tax: + Shipping: + Handling Charge: Order Total: Order Refund Total:			\$262.26 50.00 \$39.34 \$30.00 \$301.60 (\$0.00)
1 Item				×	RE-ORDER COPY ITE	MS TO CURRENT CART	SAVE AS LIST
Product			Quantity		Unit Price		Total Price
Shipped on 2023/04/04	Childcraft ABC Furnishings All Over Rain	bows Carpet, 6 x 9 Feet, Rectangle	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.

Approver's Invoices		*			Search by Invoice # O On Invoice Number	der #
	Filter by	Date	Invoice Amount e.g. 100.00	PO Number e.g. 123456		L Download Invoices Select Invoice(s) to download Download Rittered Invoice List
Invoice Filters: × 1 5 Invoices All	01/01/2023 To 03/01/20	23 Invoice Date \$	Invoice Amount (: Open Balance \$	Order #	P0#
	(²⁰⁸¹³¹⁸⁴) (²⁰⁸¹³¹⁷⁵)	02-07-2023	\$343.10 \$448.92	\$0.00 \$0.00	<u>10257</u> 102957	23025 2303:

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.

Administrator's		~			Search by Invoice # O OI Invoice Number	rder #
	Filter by Date Mine ® Att 07/01	/2023 - 08/10/2023	Invoice Amount e.g. 100.00 RESET	PO Number e.g. 123456 APPLY		Eliters Actions A
Invoice Filters: × 07. 41 Invoices	/01/2023 To 08/10/2023				Showing 10	Requests: 1-10 of 41 < 1 2 3 >
■ All	Invoice # \$	Invoice Date \$ 08-07-2023	Invoice Amount ¢ \$116.10	Open Balance ÷ \$116.10	Order #	PO # 2400

- 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 <u>select.schoolspecialty.com</u> (U.S. customers) or <u>select.schoolspecialty.ca</u> (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.

School Specialty.	Shop in Canada Help 1-888-38	8-3224				Sign In / Request Access
Shop Our - Shop By Learning - Shop By Products Model Environn	Learning – Shop ment FlagHou	Featured Assortments	- Ideas & Resources	- Deals & Clearance	- Quick Order	My Dashboard
Sign in to take advantage of your best pricing.	Everyday Free	Shipping on Qualifying Orde	ers Over \$69.	Learn more about o	our <u>FREE Environmen</u>	ts Design Services.
			*User	Sign In to mame r Username	Your Acco	ount
			*Pass Ente	word r Password		
	T	IN W		Sign In	or —	orgot <u>Username</u> ? orgot <u>Password</u> ?
Transforming Mo	re Than Cla	assrooms		Find You	ur Organization	

- 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.**

New Ecom's Users	~		Find	a User
Users ECOMMERCE TEST SCH	OOL DISTRICT			
1 Users				ACTIONS
Full Name C	Username	Email Address	Roles \$	Location \$
First Name Last Name Active	pwresetuser	youremail@schoolspecialty.com	Buyer	ECOMMERCE TEST SCHOOL DISTRICT
User Details Username pwresetuser User Created 03/15/2023 by New Ecom Admin		Password		FORCE PASSWORD RESET
Contact Information				
Username: " pwresetuser				
First Name *				
Last Name *				
Email Address *				
youremail@schoolspecialty.com				
(800) 5132465 Ext.				
Gender:				
Mobile Phone Number:				
Birthday Privacy Policy Year				
····· ¥				
Month				

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.

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		
	*	



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**