Administrator’s Guide

Manage Your Business

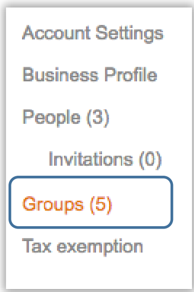
To access account management tools such as groups or users, go to the **Manage Your Business** section of your account.

- Hover over [**User]’s Account for Business > Manage Your Business**.

Groups

Your organization’s business account may be structured into various groups. If you do not manage the entire account, use the **Groups** section on the left hand side of **Manage your Business** to navigate to your specific group.

- From the list of groups, select **Manage** to customize settings or add users to the group level.



Once in the group, the **Groups** section at the left will reflect any **subgroups** within the overall group. You can manage settings at the subgroup level.

To add a subgroup, use the **Add a Group** button at left.

- Name the new group and select the appropriate payment options.
- Individual Payment – users enter their own payment and shipping information.
- Group Payment – Buyers share pre-set payment, such as a credit line, and shipping information.
- Groups and subgroups can only be deleted once all users are deleted from that group.

Invite Users

To add a user, click into the group or subgroup you would like to add them to. Once there, click **Add a Person** at the right.

- Enter the individual’s school email address. The buyer will create a password, but the email for their login will not change.
- Select purchasing permissions.
- Permissions can be changed later.

Invite the buyer by selecting **Add Roles.**

- Requisitioners can place orders but only have visibility into their own account history.
- Administrators manage people, groups, roles, etc. and can view the orders of others and run reports.

Buyers can be removed from the account at any time under the **People** section of the account.

Pending Invitations

Keep track of users in the **People** and **Invitations** sections of the menu at left.

- Buyers listed in the **People** section have already accepted their invitation. As an admin you have visibility into their purchases
- Buyers listed under **Invitations** have not yet activated their accounts.

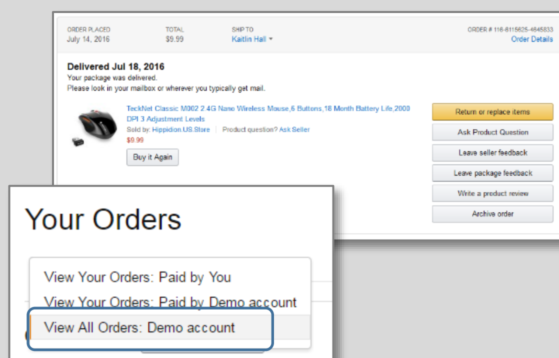
Once a user is invited, **they have 7 days to accept their invitation** and complete their user registration.

- If a buyer does not accept their invitation in this timeframe, the invite is listed as **Expired** in the invitations section. **Resend** the invitation to ensure the buyer can register.

Your Orders

To access this view of your organization’s order history, hover over **[User]’s Account for Business > Orders.**

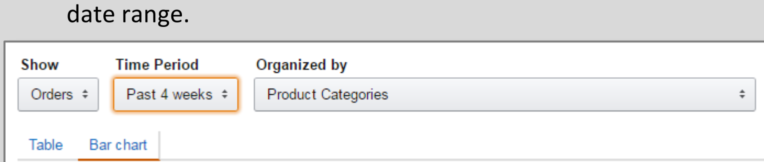
- To print invoices, select **Order Details > View or Print Invoice,**
- To view the orders of other users in the account or group, toggle down to the **View All Orders: *Organization Name*.**



Business Analytics

To view spend analytics reports, hover over **[User]’s Account for Business > Business Analytics.**

- Choose to show Orders, Returns, Refunds, or Reconciliation details.
- Select the time period you would like to view or enter a custom date range.



Use Business Analytics to view orders in either a Bar Chart or Table view.

- The bar chart view is recommended for reviewing your purchases over time.
- The table view provides order detail information and can be downloaded as a CSV at the right of the page.