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.