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**.

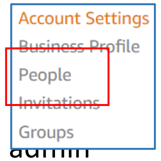
Invite Users

To add a user, go to the **Manage Your Business** section of your account. Once there, click the yellow “**Add People**” box.

- 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 (Requisitioner, Administrator).
    - 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.
- Invite the end user by selecting **Add Roles.**

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

Pending Invitations



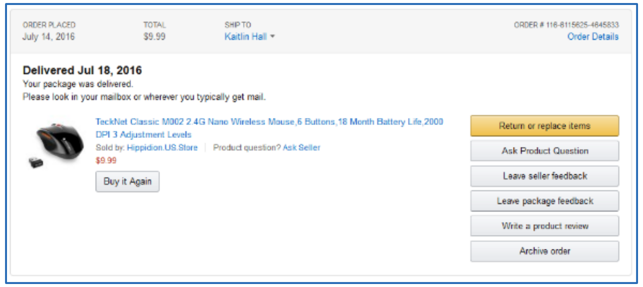
Keep track of users in the **People** and **Invitations** sections of the menu at left.

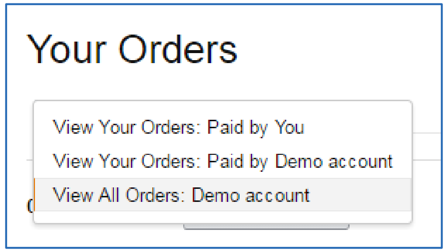
- Buyers listed in the **People** section have already accepted their invitation. As an admin you have visibility into their purchases
- Buyers listed under **Invitations** have not yet activated their accounts. Once a user is invited, **they have 21 days to activate their account** and complete.
- If a Requisitioner does not accept their invitation in this timeframe, the invite is listed as **Expired** in the invitations section. **Resend** the invitation to ensure the Requisitioner can register.

Your Orders

To access the order history for your School or Department, hover over **your Account for Business,** select **Your Orders.**

- To view the orders of other users in the account or group, toggle down to the **View All Orders: *Organization Name***





Business Analytics

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.

To view spend analytics reports, hover over **your Account for Business,** select **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.