

# **How to Order Online**

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# Logging In

Our site can be found at <u>www.offess.com</u>. Your username is case-sensitive. See the next section regarding passwords.





# Passwords

Once your account is set up to order online, you will receive a temporary password from your account manager or customer service. Upon logging in the first time you will be prompted to change it, and it must meet the criteria below.

Then, every 90 days, our system will require you to reset your password.

Passwords must contain:

- At least 8 characters
- At least 1 uppercase
- At least 1 lowercase
- At least 1 number
- At least 1 special character (!@#\$%^)
- Cannot be the same as any of your last 5 passwords

The system will prompt you to change your password when it is time.

You can change your password at any time here:



*Please note: due to data security compliance OE has no way of knowing what your password is or was.* 



# **Favorites Lists and Company Lists**

**Favorites Lists** allow you to save your most common items on a convenient list located in the top right corner of our site. Items can be easily added to your favorites list. See below. You can also manage multiple lists, rename lists, or delete your lists.

Access your Favorites List or Company Lists here.

Green	Q	Get up to Company List	Favorite			Live Chat
MY ACC	OUNT					
	Co	mpare Releva	ince	~	== ==	
_	_	_	-	-	_	-

30001 "		Compare	Relevance	<b>_</b>
Compare	Select a Shopping List C Shopping List Create a new shopping list	e Pan- oint Pens		\$25.20 / DZ
	Company List Create a new company list	etractable - Blue - Tanslucent Barrel - 12 / point that delivers consistent writing grip for comfort and control ible ink supply		Add To Cart
	<b>a</b>			$\bigtriangledown$





# **Order History**

To look up your order history, click on the "Order Center" tab as shown below, then order history. You can use the options below to drill into your orders.

TREE 2-DAT STUTT	••• ••••	amora	n requireu							Green Denvery:	Get up to	) a \$100 g	girt caru in	uni Quartet
essentials	5	Sea	arch by Keywo	rd/Item#						٩	Company List	Favorite	Logout	\$ 0.00
products ~	INK 8	& TONER	FINDER	Q	UICK ORDER		ORDE	R CENTER		ACCOUNT				
, Greg Dealer of Office Essen	ials - Virtual Custo	mer		•			Orde	r History						
							Quid	ck Order						
Saved Carts	Order	Histe	ory				Schedu	led Orders						
Pending Orders	Group#:			Custo	merID:		Retur	n Request						
Confirmed Orders	SelectType:	Orders	for Current L(~	)			6							
Shipped Orders	Search	<u>Reset</u>	Save Current Sett	ings			Special i	tem Request						
	Date		Order/Cart/Gr	oup#	PO		Ship To	Cost Ctr	Total		Cust/Logi	in		
Rejected Orders	11/2/2021		saved quote			1			25.20	Move To Cart	1000 gregdeale	r	Use as Temp	plate



# How To Place An Order

There are several ways to place an order

	FREE 2-DAY SHIPPING	\$0 Minimum order required			Green Delivery!	Get up t	o a \$100 g	ift card fr	om Quartet	
C	essentials	Search by Keyw	ord/Item#		٩	Company List	Favorite	2 Logout	\$ 0.00	Live Chat
Г	products ~	INK & TONER FINDER	QUICK ORDER	ORDER CENTER	MY ACCOUNT					
, Gr	eg Dealer of Office Essentials -	Virtual Customer								
			VER							
			A Part of the					_		-

- 2. Search (highlighted area): Type in keyword(s). Refine results by subcategory, brand, type, color, recycled content, etc. Then sort by best match, brand, price, etc. (ex. Black Sharpie)
- *3. Browse*: By Product Category (green box) & then drill down by Sub-Category. Refine results by subcategory, brand, type, color, recycled content, etc. Then sort by best match, brand, price, etc. *(ex. Black Sharpie*)



# **Checkout Process**

Go to your cart and click checkout, then follow the prompts to complete your order.

#### Note a few differences from the old site:

- If you are repeatedly asked to choose a ship-to, and you want to set a default address to stop this behavior, contact customer service at 866.251.9802 or use the Live Chat feature, and we can set a default for you.
- If your company has summary billing, you have to select a Cost Center.
- If you use a credit card, you will have to enter the 3- or 4-digit security code.



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# Approvals

If your company uses an approval process, the website will send an email to your approver to review your order for approval once you check out.

If you are the approver, once you click the link from the email, you will see the following screen:

PRODUCTS ~	INK & TONER FINDER	QUICK ORDER		ORDER CENTER	MY ACO	DUNT			
Office Essentials Demo Approv	er of Office Essentials - Demo Customer								
Status Rule	Order/Cart/Group#	PO	C Lines	Ship To	Cost Cr	Date	Total	Login	
E Over.01	W0-13241	1	1	Default		11/2/2021	\$7.52	offessdemo	
P Over.01	WO-13242	2	C 1	Default		11/2/2021	\$11.90	offessdemo	
Select All Clear All									
						Reje	ict	Approve	
						To add an	ander halfare	announced which the	
						To edit an Order/Ca	order before t/Group# nun	approval, click the	
						To edit an Order/Ca	order before t/Group# nun	approval, click the liber above.	
						To edit an Order/Ca	order before t/Group# nun	approval, click the liber above.	
						To edit an Order/Ca	order before t/Group# nun	approval, click the	
Customer Service	Online Tools	Oth	ner Tools			To edit an Order/Ca	order before t/Group# num	approval, click the	
Customer Service	Online Tools Order Approval Wizard	Oth	<b>ter Tools</b> rs, invoices, & C	Quotes		To edit an Order/Ca	order before t/Group# nun	approval, click the	
Customer Service Request a Return Report Subscription	Online Tools Order Approval Wizard Dealer Order Approval	Oth Orde Sche	<b>ter Tools</b> rs, invoices, & C duled Orders	Quotes		To edit an Order/Ca	order before t/Group# num	approval, click the	
Customer Service Request a Return Report Subscription Redeem Request	Online Tools Order Approval Wizard Dealer Order Approval Ink & Toner Finder	Oth Orde Scher	<b>ter Tools</b> rs, Invoices, & C duled Orders	Quotes		To edit an Order/Ca	order before t/Group# nun	approval, click the	
Customer Service Request a Return Report Subscription Redeem Request Contact Us	Online Tools Order Approval Wizard Dealer Order Approval Ink & Toner Finder Special Item Request	Oth Orde Scher	<b>ter Tools</b> rs, invoices, & C duled Orders	Quotes		To edit an Order/Ca	order before t/Group≢ nun	approval, click the	

(You cannot set up your own approval process, so if this is something you want, please contact your account manager.)





# **View Order Status**

- Go to Order Center
- Select Order History
- Select Type: Orders for all Logins (Since you have multiple users, this field must be selected to view all orders)
- Select "Saved Carts" This will show any open order that is awaiting approval or has been saved by one of your end-users
- Select "Confirmed Orders" This will show an order that has been placed and OE has confirmed receipt of the order
- Select "Shipped Orders" This will show all shipped orders, as well as the tracking information
- Select "Order Search" This will show all orders placed on your account

Ce office essentials	s	Search by Keyword	l/Item#			٩	Company List Favorite L	
products 🗸	INK &	TONER FINDER	QUICK ORDER	ORDER CENTER	N	IY ACCOUNT		5 0.00
, Office Essentials Demo User	of Office Essentials	- Demo Customer						
Saved Carts	Order H	listory						
Pending Orders	_							
Confirmed Orders	Group#:	Orders for all Custo ¥	CustomerID:	LoginID:				
Shipped Orders	Search	Orders for Current Login Orders for all Logins	gs					
	Date	Orders for all Customer	PO Ln Ship To	Cost Ctr	Total		Cust/Login	
Rejected Orders	12/10/2021 !	View Saved Cart	9		437.96	Move To Cart	1001065 osborned@wustl.edu	Use as Template
Order Search	12/10/2021 !	View Saved Cart	2		107.43	Move To Cart	1001065 osborned@wustl.edu	Use as Template
	12/10/2021 !	View Saved Cart	3 BATON ROUGE LA	03 - BATON ROUGE LA	655.74	Move To Cart	1003643 michael.goree@butlersnow.com	Use as Template
	12/10/2021 !	View Saved Cart	7		156.34	Move To Cart	1001065 pokornys@wustl.edu	Use as Template
	12/10/2021	View Saved Cart	1		180.88	Move To Cart	1002100 cmaupin@bensonhill.com	Use as Template
	12/10/2021	View Saved Cart	1 POLICE DEPT/GREG V		26.00	Move To Cart	9990218 gviehman	Use as Template
	12/10/2021 !	View Saved Cart	5		212.04	Move To Cart	1001065 Irmartin@wustl.edu	Use as Template
	12/10/2021	View Saved Cart	1		92.24	Move To Cart	1002385 springfieldpunchout	Use as Template
	12/10/2021 !	View Saved Cart	9		129.44	Move To Cart	1001065 gezellac@wustl.edu	Use as Template
	12/10/2021 !	View Saved Cart	5		47.17	Move To Cart	1001065 caustin@wustl.edu	Use as Template
	Novt							



# **Additional "How to" Information**

#### **Saved Orders**

Saved orders allow you to build orders over time and then submit them when you're ready.

**To save an order**, view your cart, and then click the Save Cart link and give your saved cart a name, as shown below.

PRODUCTS ~	INK & TONER FINDER	OUICK ORDER	ORDER CENTER	MY ACCOUNT		\$ 25.20
Greg Dealer of Office Essentials	- Virtual Customer					
View Cart	Checkout					
My Shop Cart					Order Sum	narv
Chara Card Name					Itoms	1
PO Number		+ Add more items			SubTotal:	\$25.20
Budget	٩	Update	Save	ar Cart		
		Cost GM% UOM	Oty Ext Price Ad	tions	Proceed To	Checkout
Product Man	ufacturer Price					
Product Man	ufacturer Price			$\sim$	Enter Coupon Here:	
Product Man	r CORP. OF AMERICA 25.20	\$15.65 37.90 DZ	1 \$25.20 (	ave For Later	Enter Coupon Here:	Apply

**To retrieve a Saved Order**, go to Order Center > Order History > then Saved Carts. When the order comes up, select Move to Cart.

										\$ 0.00	
PRODUCTS ~	INK & TONER FINDER	QUICK ORDER	ORDE	R CENTER	M	IY ACCOUNT					
Hi, Greg Dealer of Office Esser	ntials - Virtual Customer		Order	r History							
Court Costs			Quic	k Order							
Saved Carts	Order History		Schedu	led Orders							
Pending Orders	Group#:	CustomerID:	Return	n Request							
Confirmed Orders	SelectType: Orders for Current Lov		Special It	tem Request							
Shipped Orders	Search Reset Save Current Setting	IS									
	Date C Order/Cart/Grou	p# PO	Ln Ship To	Cost Ctr	Total		Cust/Logi	n			
Rejected Orders	11/2/2021 saved quote		1		25.20	Move To Cart	1000 gregdealer		Use as Templ	ate	
Order Search							, ,,				



#### Save for Later

Not to be confused with Saved Carts, Save for Later is a per-item feature within the Shopping Cart to use if you have an item in your cart you are not ready to purchase yet, but might later. In this case, you can click Save for Later to remove the item from your order, but not from your cart.

Ce office essentials	Search by Keyw	ord/Item#		Q	Company List	Favorite	
products ~	INK & TONER FINDER	QUICK ORDER	ORDER CENTER	MY ACCOUNT			\$ 306.49
i, Greg Dealer of Office Essentials -	Virtual Customer						
View Cart	Checkout						
My Shop Cart					Order S	umma	ary
Shop Cart Name		+ Add more items			ltems SubTotal:		2 \$306.49
Budget	Q	Update	Save	ear Cart	Proce	eed To Che	eckout
UNV12113 UNIV	VERSAL OFFICE PRODUCTS 30.2	Cost GM% UO	M Qty Ext Price .	Actions	Enter Coupor	n Here:	Apply
Top Tab Manila File Fi	olders, 1/3-Cut Tabs, Assorted Positions ject: Project ID	Letter Size, 11 pt. Manila, 100/Box Budget: R Budget ID	Message: Line Comme	ant	Enter you Coupor	ır Coupon Co n/Discount to	ode and Apply 9 your order.
Copy Paper, 92 Brigh	VERSAL 276 t, 20 lb, 8. 5 x 11, White, 500 Sheets/Rea ject: Project ID	21 \$31.90 88.45 CT m, 10 Reams/Carton Budget: Q Budget ID	1 \$276.21 Message: Line Comme	Save For Later			
+ Add more items		Ente	r Message for your company's Ap visible if you use our Order Appr	prover to view, this is oval system.			
Update Sav	e Clear Cart						



	Manufacturer	Price	Cost GM%	UOM Qty	Ext Price	Actions		
UNV12113	UNIVERSAL OFFICE PRODUCTS	30.28	\$7.12 76.49	BX 1	\$30.28	Save For Later	Apply	
Top Tab Ma	nila File Folders, 1/3-Cut Tabs, Assorter Project: Project ID	B Positions, Letter Size, 11 Budget: 🔍	pt. Manila, 100/E Budget ID	Box Message	Line Con	nment	Enter your Coupon Code and Apply Coupon/Discount to your order.	
dd more items				Enter Message for only visible if you u	your company's ise our Order Aj	Approver to view, this is pproval system.		
Update	Save Clear Car							
						1		
For Later Items								
Product Descript	on		Unit	Price Qty	Ext. Budge Price	et		
Copy Pape	r, 92 Bright, 20 lb, 8. 5 x 11, White, 50	) Sheets/Ream, 10 Reams,	Carton CT	276.21 1	276.21	Q		
JNV21200			Messa	ige:				
	Clear Cart							
Update								



#### **Scheduled Orders**

If you would like to schedule an order to be automatically placed on a regular interval of your choosing, follow these steps.

Add the items that will be on your scheduled order to your cart and click proceed to checkout. (It won't place your order yet.)

At the bottom of the next screen is a Schedule Order button.

ipToName: Office Essentials - Demo Customer	Bill To Name: Office Essentials - Demo Customer	104.	30.00
dress 1: 1834 WALTON RD	Address 1: 1834 WALTON RD	Total:	\$41.47
dress 2:	Address 2:		-
y: SAINT LOUIS	City: SAINT LOUIS	Plac	e Order
ste: MO	State: MO		
o: 63114-5820	Zip: 63114-5820		
ntact: Office Essentials Demo User			
one:			
:			
Number: Trest			
ecial Instructions:			
ost Center Update/Change Cost Center	Payment Update/Change Credit Card Information		
ost Center:			
hon Cart Name			
nop care Name			
Product Description	OrdQty Price/UOM Ext Message Budget Project		
	- The		
UNV21200 Copy Paper, 92 Bright, 20 lb, 8. 5 x 11, Reams/Carton	White, 500 Sheets/Ream, 10 1 \$41.47/CT \$41.47		
-			
	Save Schedule		

Clicking that will give you the following options to set your frequency. Please note: days of the week are represented by numbers. Monday is 1, Tuesday is 2, etc.



You can also decide if you want to be alerted by email to place the order, or have it automatically process itself with no intervention:

PRODUCTS V	INK & TONER FINDER		ORDER CENTER	MY ACCOUNT				
ii, Office Essentials Demo User of Off	ice Essentials - Demo Customer							
							)	
	Schedule O	rder Setup						
	ShopCart Name		Place order with this Shope	art Name.				
	Select Frequency	~	Choose from One time, We	ekly, Semi-Monthly and Mont	hly.			
	12/10/2021	End Date	You may leave End Date bla	ink to keep schedule open en	ded.			
	Schedule On Day		1-5 for Weekly, 1-15 for Ser	ni-monthly, 1-31 for Monthly.				
	Select Schedule	Туре 🗸	Send Email Notification: This selection will allow you be placed. Becommended i	to be reminded via an email f PO is required	that your order need	ls to		
	Se	end	Automatically Create Orde This selection will allow you email.	er: to automatically place each o	rder without a remir	nder		
							ļ	

At the moment, there is not an intuitive way to pause the schedule if need be. A workaround is to change the end date prior to the current date so it will never execute. Until you change the end date back to what it was originally.

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### Soft Subs

When placing an order, soft sub logic offers a less expensive alternative when the entered item is designated as a soft sub. Soft subs are suggestions. If you want to keep the original item, click confirm. If you're going to use the suggested alternative, click the radio button on the suggested sub and click confirm. If you see the thumbs-up icon below an item, a soft sub exists on an item.







#### **Hard Subs**

OE will never substitute a product without your permission. But when you need us to, we can. Furthermore, we will come to you with proactive considerations. For example, if we work together to convert a handful of meaningful products to greener alternatives, you may decide you always want these products used in lieu of another. In this case, we can incorporate an approved hard product sub.

UNV21200 is added to the cart here, but the user's company has automatically asked us to substitute UNV91200. This happens automatically with no action needed on the part of the orderer.

<b>Q</b> "unv212	00 "	Cor	npare Relevance ~
2 items			
Filter By			
Categories ( 2 ) Miscellaneous(1) Office Paper(1)	UNV91200	UNIVERSAL	<b>\$43.08</b> /ct
Manufacturers ( 2 )	"NEED A		
CO	PAPER, 8. 5X	<b>11, 20#, 96BRT, WH</b> 968RT, WH	1 Add To Cart
			$\heartsuit$
View Cart Checkout			
My Shop Cart			/ PL
wy shop care		Or	der Summary
Shop Cart Name		Iten	is 1
PO Number	+ Add more items	Sub	Total: \$43.08
PO Number Budget Q	+ Add more items Update Save	Clear Cart	Total: \$43.08
PO Number Budget Q	+ Add more items Update Save Cost GM% UOM Qty Ext P	Clear Cart	Proceed To Checkout
PO Number	+ Add more items Update Save Cost GM% UOM Qty Ext P	Clear Cart	Total: \$43.08 Proceed To Checkout r Coupon Here:
PO Number	+ Add more items Update Save Cost GM% UOM Qty Ext P \$34.46 20.01 CT 1 \$43.0 Messane: Link	Clear Cart       rrice     Actions       18     Save For Later       2 Comment     Save For Later	Total:     \$43.08       Proceed To Checkout       r Coupon Here:         Apply.
PO Number         Output           Budget         Q           Product         Manufacturer         Price           UNV91200         UNIVERSAL         43.08           PAPER, 8. 5X11, 20#, 96BRT, WH         Project ID	+ Add more items Update Save Cost GM% UOM Qty Ext P \$34.46 20.01 CT 1 \$43.0 Message: Linc Budget: Q Budget ID	Clear Cart       rrice     Actions       18     Save For Later       26 Comment     Save For Later	Total:     \$43.08       Proceed To Checkout       r Coupon Here:       Apply       Enter your Coupon Code and Apply       Coupon/Discount to your order.
PO Number Budget Product Manufacturer Price UNV91200 UNIVERSAL 43.08 PAPER, 8. 5X11, 20#, 968RT, WH Project: Project ID Add more items	+ Add more items Update Save Cost GM% UOM Qty Ext P \$34.46 20.01 CT 1 \$43.0 Message: Lint Budget: Budget ID Enter Message for yoo only visible if you use	Clear Cart         rice       Actions         18       Save For Later         a Comment       Save For Later         a Comment       Save for Later         our Order Approval system.       Save multiple system.	Total: \$43.08 Proceed To Checkout r Coupon Here: Apply Enter your Coupon Code and Apply Coupon/Discount to your order.
PO Number Budget Product Manufacturer Price UNV91200 UNIVERSAL 43.08 PAPER. 8. 5X11, 20#, 96BRT, WH Project: Project ID Add more items Update Save Clear Cart	+ Add more items Update Save Cost GM% UOM Qty Ext P \$34.46 20.01 CT 1 \$43.0 Message: Linc Budget: Budget ID Enter Message for you only visible if you use	Clear Cart       rrice     Actions       18     Save For Later       20 Comment     Save For Later	Interim state     \$43.08       Proceed To Checkout       r Coupon Here:       Arely       Enter your Coupon Code and Apply Coupony/Discount to your order.
PO Number Budget Product Manufacturer Price UNV91200 UNIVERSAL 43.08 PAPER, 8. SX11, 20#, 968RT, WH Project: Project ID Add more items Update Save Clear Cart	+ Add more items Update Save Cost GM% UOM Qty Ext P S34.46 20.01 CT 1 \$43.0 Message: Line Budget: Budget ID Enter Message for you only visible if you use	Clear Cart       rice       Actions       B8       Save For Later       a Comment	Total: \$43.08  Proceed To Checkout  r Coupon Here:  Apely  Enter your Coupon Code and Apply Coupon/Discount to your order.
PO Number Budget Product Manufacturer Price UNV91200 UNIVERSAL 43.08 PAPER. 8. SX11, 20#, 96BRT, WH Project: Project ID Add more items Update Save Clear Cart	+ Add more items Update Save Cost GM% UOM Qty Ext P \$34.46 20.01 CT 1 \$43.0 Message: Link Budget: Budget ID Enter Message for you only visible if you use	Sub Clear Cart rice Actions Reference Actions Re	Total:       \$43.08         Proceed To Checkout         r Coupon Here:         Apply         Enter your Coupon Code and Apply         Coupon/Discount to your order.



## **Contract Indicators**

The red icon with a dollar sign below denotes when an item is on one of your contracts.





### **Restricted List**

On our old site, if your company by policy has items they do now want you to purchase from Office Essentials, and you tried to order one of these items, the system would tell you that you are restricted from buying it. On the new site, it says "restricted by company policy".





### **Request a Return**

To request a return, go to Order Center > Request Return and enter your order number or use the magnifying glass icon to search for it. Then fill in your contact information and send it over.

PRODUCTS	INK & TOI	NER FINDER	QUICK ORDER	ORDER CENTER	MY ACCO
Hi, Greg Dealer of Offic	e Essentials - Virtual Customer			Order History	
				Quick Order	
Return	Request			Scheduled Orders	
Order:	٩			Return Request	
roduct	Description	U/M	Price	Special Item Request	Return Qty
Name Greg Dr Email gbussm	ann@offess.com	Phone		Ext	



#### **Live Chat Button**

If you still have questions, please utilize our live chat feature to get right to our Customer Care team, email them at customerservice@offess.com, or call us at 866.251.9802.

