

STAPLES ADVANTAGE

Exclusive Vendor for Office Supplies

SHOPPER INSTRUCTIONS

Shop & Browse SCREEN SHOT WALK-THRU

*****You must register and create an individual SMU Shopper Account****

**Office supply orders are placed through the Building AU (Authorized User)
or Department Order Coordinator.**

Staples Customer Support Team
support@staplesadvantage.com
877-826-7755

SMU Purchasing
Cathy Heckman
Category Manager - Business Services
heckman@smu.edu
214-768-2174

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Terminology

AU – Authorized User

Benefit eligible employees designated within each building that are authorized to place Staples Advantage orders.

Department Order Coordinator

Order Coordinators are people within a department or area who are designated to collect supply requests from department members and send a consolidated order request to the building AU. When there is no department Shoppers will send requests directly to the building AU.

Shopper

All benefit eligible employees can become a Shopper and are allowed to create a SMU Staples Advantage shopping account. The account will show SMU pricing and items that are allowed to be purchased.

#1 Exclusive Vendor & Exceptions

EXCLUSIVE VENDOR:

Staples Advantage is the EXCLUSIVE VENDOR for office supplies and the mandatory source for SMU Dallas campus, SMU-in-Taos and SMU DataArts. in compliance with University Policy 4.8. *Purchasing must review and approve exceptions in advance of placing an order from a non-approved source.*

Shoppers and AUs (Authorized Users) should look for supply, snack and office items on Staples Advantage first before shopping on Amazon or requesting an exception to buy from another source.

Amazon orders route to purchasing@smu.edu for review and must be approved before the order is released.

PURCHASE EXCEPTIONS:

Only if Staples Advantage does not carry, cannot get, does not have a comparable item or cannot get item in the required amount of time, then another source may be considered.

All exceptions must be approved by Purchasing prior to making the purchase.

Contact Cathy Heckman heckman@smu.edu or purchasing@smu.edu for exception review.

Purchases made through other sources without prior approval may not be reimbursed and SMU-card suspension may be implemented.

#2 Register for a Shopper's Account

CLICK THIS LINK to register for Shopper Account: [Staples Advantage Registration link](#)



- You must register and shop using your SMU Shopper's Account.
- After registering you will receive a Welcome Email in 2 to 3 business days.
- You will not be able to log in until you follow the steps in the Welcome Email.
- SMU Shoppers are registering for access to SHOP & BROWSE.
- Orders are placed by and delivered to Building AU (Authorized User).

Register for Online Ordering

WELCOME SMU to StaplesAdvantage.com. Staples' business-to-business Internet ordering solution. With StaplesAdvantage.com, you can order supplies electronically from your computer anytime. The site provides immediate access to over 500,000 products, with new additions daily, at your company's negotiated low prices!

Register Now

Fields marked with an * are required. **Input your name, phone and SMU email**

* First Name:

* Last Name:

* Phone: - - X

* Email:  **SMU emails - no personal emails**

Submit

#3 Welcome Email

After registering, you will receive a **Welcome Email** in 2 to 3 days from

“Staples Support <Orders@staplesadvantage.com>” with your log-in information.

***** You will not be able to log-in until you follow the steps in the Welcome Email.**

KEY POINTS in the Welcome Email:

StaplesAdvantage.com



The Welcome Email will have a live link to access the SMU site. **Bookmark the page.**

SMU ACCOUNT #: **1823718**



Input the **SMU account #** for the initial account set-up

USER ID: **XXX@SMU.EDU**



User ID will be the **SMU email address** you entered (in all caps)

PASSWORD: Example1*



Temporary password. You must change the temporary password the first time you log in.

Passwords must have 1 upper case, 1 lower case, 1 number and 1 symbol.

#4 Delivery and Backorder Info

1. **PLAN AHEAD!!!**

Next business day delivery is **not** guaranteed. Some items may take 4 to 5 business days to arrive.

2. Delivery time to SMU Dallas campus is from 8:30am to 5:00pm.
3. Order cut-off time is 3:00pm. Orders placed after 3:00pm are considered the next day's business.
4. Most items are fulfilled from the local Coppell warehouse.
5. Items not stocked in Coppell are fulfilled from other Staples warehouses or 3rd party suppliers.
6. 3rd party supplier items are delivered to Coppell warehouse, then to SMU via Staples truck.
7. Back ordered and special order items will be delivered when stock is available.
8. Staples will cancel back ordered items not filled within 30 days and have to be re-ordered.
9. Staples will cancel discontinued items and replacement items have to be re-ordered.
10. Staples will email the AU when an item is canceled or discontinued so the item can be re-ordered.

#5 Shopper Account LOG IN

To **SHOP OR BROWSE** for office supplies use your individual **Shopper's Account**.

Click this link to go to: <https://www.staplesadvantage.com>

Enter **USER ID** you created when setting up account

Please enter a User ID to access an existing account

User ID *

Next

[Login with User ID/Account number and Password](#)

[Forgot User ID?](#)

[Forgot Account number?](#)

[Forgot your Password?](#)

Can't Sign in to Staples Advantage?

[My company is new to Staples Advantage](#)
[My company has a Staples Advantage account, but I cannot sign in](#)

Contact us

Staples Advantage customers
1-877-826-7755

#6 User ID and Password

Please sign in to access your account information

User ID *

Enter YOUR USER ID



Password *

PASSWORD YOU CREATED



Password is case sensitive.

Keep me signed in

Sign in

[Login with User ID/Account number and Password](#)

[Forgot User ID?](#)

[Forgot Account number?](#)

[Forgot your Password?](#)

Can't Sign in to Staples Advantage?

[My company is new to Staples Advantage](#)

[My company has a Staples Advantage account, but I cannot sign in](#)

Contact us

Staples Advantage customers

1-877-826-7755

PASSWORD is case sensitive and must contain 3 of 4 character types: 1 capital letter, 1 lower case letter, 1 number & 1 symbol

#7 Shipping Location

Confirm shipping location change

← Back

Account number : **1823718**

Current shipping location

SMU-VIEW ONLY
SMU/BROWSE
BUILDING AU
DALLAS TX 75206

New shipping location

SMU-VIEW ONLY
SMU/BROWSE
BUILDING AU
ORDER WILL BE DELIVERED TO BLDG AU
DALLAS TX 75206

**Shopper
SHIPPING LOCATION
will be "SMU-VIEW ONLY"**

**Orders are delivered to
Building AU
(Authorized User)
to their designated area.**

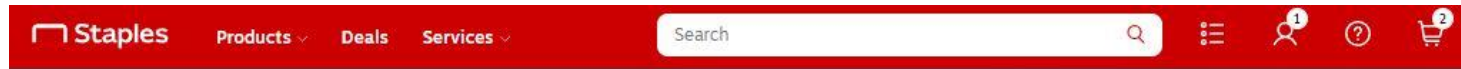
#8 Shopper Profile & View Cart

The image shows a mobile application interface. At the top, there is a red navigation bar with a search bar and icons for menu, profile (with a '1' notification), help, and cart (with a '2' notification). Below the navigation bar, there is a banner for the 'EDUCATION WELL-BEING CENTER' with the text '< Solutions for budget planning and a safe return to in-person learning.' Two blue arrows point from the profile and cart icons in the navigation bar to the corresponding menu items in the profile dropdown menu on the right. The profile menu includes options like 'My Profile', 'Change Password', 'Order History', 'Frequently Purchased', 'Auto Restock', 'Quick Order', 'Saved Print Templates', and 'Sign Out'. A 'View all' link is at the bottom of the menu.

**Click Person for
Shopper Profile maintenance
Order History
Sign Out**

View Cart

#9 On Contract Pricing



[Back](#) [Home](#) > [Writing Supplies & Instruments](#) > [Writing Supplies](#) > [Pens](#)

BIC Soft Feel Retractable Ballpoint Pen, Medium Point, 1.0mm, Black Ink, 36/Pack (SCSM361BLK)

\$19.74 On Contract

36 pk \$0.55/pen

4963 | Model #: SCSM361BLK | CIN #: 1534963

★ ★ ★ 19 Reviews | [Ask a question](#) | [Share](#)

Delivered Mon, Jun 13

[Free Returns](#)

Quantity
1

Add to cart

[Compare](#) [Add to list](#)

Staples Promotional Products

Promote your brand on products like this. Talk with our industry experts to bring your logo to life with curated product selections that stand out in minds and marketplaces.

Want expert help now? [Learn More](#)



Look for "ON CONTRACT" ribbon for best pricing.

Items not on contract **ARE ALLOWED**.

*****NEED HELP FINDING AN ITEM*****

Contact Customer Service
support@staplesadvantage.com
877-826-7755

Contact AU for additional help.

Feedback

#10 Budget Org & Packing Slip Notes

STAPLES
Business Advantage

SEARCH

BROWSE CATEGORIES | QUICK ORDER | YOUR LISTS | YOUR DASHBOARD | **\$57.47**

My Cart | Add to List | PDF Version | Print

SHIPPING INFORMATION
Shopper Checkman
Test Ship To
SMU/BROWSE
BUILDING AU
DALLAS, TX 75206 USA
ORDER WILL BE DELIVERED TO BLDG AU
*214 768-2174
Edit

ACCOUNTING INFORMATION
BUDGET CENTER
P.O. NUMBER
P.O. RELEASE

PAYMENT METHOD
 Invoice this account
 Use a new credit card

SUBTOTAL \$57.47
TOTAL \$57.47
SUBMIT ORDER

ONE ORG #
Type fund & org here when all items charge to the same ORG #

Items for Delivery
SORT BY: PLEASE SELECT

PACKING SLIP NOTES
Type person's name who item is for.

MULTIPLE ORG #s
Also type fund & org when charging to different org #s

Sharpie® Fine Point Permanent Markers, Black, 12/pk (30001) \$8.21 DZ/12 7 \$57.47
Staples Item # 125328
MFR Item # 30001
Customer Item # 125328
ON CONTRACT
x Remove
Expected Delivery 11/09/2017

Packing Slip Note
YOUR NAME, FUND & ORG #

Clear Cart | Update Cart

SUBTOTAL \$57.47
TOTAL \$57.47

#11 Review, Print to PDF, Email to AU

The screenshot shows the Staples checkout page. At the top, there is a red header with the Staples logo, a search bar, and icons for Chat and Lists. The main content area is titled "Review & Checkout" and is divided into several sections: "Shipping & Delivery", "Accounting", "Payment", and "Order Summary".

Shipping & Delivery

Shipping location
SMU-VIEW ONLY
Test Ship To
SMU/BROWSE
BUILDING AU
DALLAS, TX 75206 US

Delivery details [Edit](#)
shopper Heckman - EPP Account
ORDER WILL BE DELIVERED TO BLDG AU
214-768-2174

Custom delivery date [?](#)
[Select custom delivery date](#)

Accounting

Budget Center

Purchase Order

PO Release

Payment

Payment options

Credit Card Invoice

Order Summary

Items (2)	\$25.37
Pretax subtotal	\$25.37
Estimated tax ?	\$0.00
Total	\$25.37

Savings message: Your organization has a minimum order amount. [View detail](#)

Why can't I submit my order?
Your organization has limited your access to view only. Please follow your organization's established process for submitting orders.

[Submit Order](#)

Print to pdf

When finished shopping
Click **PRINT AS PDF**

Email the PDF to the
Building AU (Authorized User) or
your Department Order Coordinator

SAMPLE PDF OF SHOPPING CART



Shipping & Delivery
shopper Heckman - EPP Account
SMU-VIEW ONLY
SMU/BROWSE
BUILDING AU
ORDER WILL BE DELIVERED TO BLDG AU
DALLAS, TX 75206 US
214-768-2174

Accounting
Budget Center
ENTER FUND & ORG #
Purchase Order
Not specified
PO Release
Not specified

Order Summary

Items (2)	\$46.35
Pretax subtotal	\$46.35
Total	\$46.35



This will be the fund & org # you entered in the cart

2 items in cart

Delivery



BIC Soft Feel Retractable Ballpoint Pen, Medium Point, 1.0mm, Black Ink, 36/Pack (SCSM361BLK)

Item #: 1534963 | MFR Item #: SCSM361BLK | CIN #: 1534963

On Contract

2 @ \$20.43 36/PK **\$40.86**
~~\$33.49~~

Packing slip note: Cathy Heckman, FUND-ORG#



BIC Round Stic Xtra-Life Ballpoint Pen, Medium Point, 1.0mm, Black Ink, 60/Pack (GSM609-BLK)

Item #: 442901 | MFR Item #: GSM609BLK | CIN #: 442901

On Contract

1 @ \$5.49 60/PK **\$5.49**
~~\$7.99~~

Packing slip note: Susan Bradley, FUND-ORG#

#12 Emergency & Exception Purchases

➤ NON-STAPLES PURCHASES

- 1) **Purchase Exception Requests for non-Staples store or other site purchases:** Email Cathy Heckman a link to the item(s), state business purpose for the purchase, and explain why Staples cannot be used.
- 2) **Concur expense reports with supply, snack, office items and water purchases are forwarded to Purchasing for review when the receipt does not show a purchase exception was allowed.** For reimbursement exception review, email Cathy Heckman the receipt, state item(s) purchased, state the business purpose for the purchase, and explanation why Staples was not used.

➤ STAPLES STORE PURCHASES

***No approval or permission is required to make a purchase at a Staples store. There are no minimum dollar purchase limits when buying at a Staples store.

The Staples store **will charge tax unless SMU is set up as tax exempt at that store. Contact store to verify SMU has tax exempt status. Contact Cathy Heckman to contact store if needed.**

If tax is charged email the receipt to purchasing@smu.edu. Purchasing will request a credit for tax paid.

[Staples store nearest SMU – 5.4 miles away](#)

11700 Preston Rd. Suite 720 @ Forest Lane, Dallas, TX 75230 --- 214-696-0675

➤ AU PURCHASES (Authorized User)

AUs may place emergency orders for orders larger than \$50 with prior approval from Purchasing.

#13 University Travel Policy

SMU has provisions in place so employees do not have to make trips to the store to purchase supplies.

Special consideration should be used when driving personal vehicles to shop for university supplies and making emergency purchases at Staples stores or other stores. SMU insurance coverage covers SMU owned vehicles and not personal vehicles.

Employees should receive permission from their supervisor prior to making shopping trips for emergency purchases. Supervisors should use their discretion when giving approval weighing the 'need' against the 'potential risk'.

Reference University Travel Policy 4.7 for further understanding.

[SMU University Policy 4.7 Travel and Entertainment-Management](#)