

## **SHOPPERS GUIDE for requesting office supplies --- revised 3-27-17**

### **MANDATORY SOURCE**

**Staples Advantage** is SMU's **EXCLUSIVE VENDOR** for office supplies and is the mandatory source for the main Dallas campus, SMU-in-Plano and SMU-in-Taos. Authorized Users (AUs) and Shoppers are required to look for office supply items first with Staples Advantage. 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 used. All exceptions must be approved by Purchasing. Office supply purchases made with personal funds without prior purchase approval may not be reimbursed.

To **SHOP OR BROWSE** for office supplies you **must register and set-up an Individual Shopper account** to access SMU items and pricing.

**PLACE ORDERS through your building AU (Authorized User) or Order Coordinator.** *Some buildings have Order Coordinators; some do not. Order Coordinators collect requests from departments and send to the building AU. Building AUs will place the orders.*

Contact Cathy Heckman for your building AU (Authorized User) contact info.

### **1) Individual Shopper Account Set-Up Instructions**

- **REGISTER**

Click this link to register with Staples Advantage. Use your **SMU email address** (no personal emails). *Reference screen shot on page 4 of this document.*  
<http://register.staplesadvantage.com/c/s?RegFormId=CznCpn>

- **WELCOME EMAIL**

You will receive a Welcome Email in 2 to 3 days from "Staples Business Advantage Support [<mailto: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.**  
*Reference screen shot on page 5 of this document.*

#### **KEY POINTS in the Welcome Email:**

- |   |  |
|---|--|
| <u>StaplesAdvantage.com</u>                           | <<< Email will have a live link to access the correct site.<br><b>Bookmark the page.</b>                                       |
| <b>ACCOUNT #:</b> 1823718                             | <<< Input the <b>SMU account #</b> for the initial account set-up  |
| USER ID: <a href="mailto:XXX@SMU.EDU">XXX@SMU.EDU</a> | <<< User ID is the <b>SMU email address</b> you entered on the registration page.  |
| PASSWORD: Staples1                                    | <<< <b>Temporary password.</b> You must change the temporary password the first time you log in. Passwords are case sensitive. |

## 2) SEARCHING FOR ITEMS

Look for **ITEM #s with ALL NUMBERS** (no letters). These items are stocked and fulfilled by Staples warehouses. They typically cost less and arrive faster than non-stocked items.

***AVOID ITEM #s that have LETTERS & NUMBERS whenever possible.** These are not stocked in Staples warehouses. They are fulfilled from 3<sup>rd</sup> party distributors and shipped via UPS and usually take longer to receive.*

## 3) CONTRACT vs. NON-CONTRACT ITEMS

**Contract items** have the lowest price. They are identified with a **BLUE BOX with CHECK MARK and state "On Contract"**. Core items have best pricing and should be selected whenever possible.

**Non-contract items ARE ALLOWED to be purchased.** They are 5% less than staples.com prices. Items that are purchased frequently or in bulk can be added to the SMU Contract Item list. Tell your AU or Cathy Heckman of items that you would like to be added to the contract item list.

## 4) CREATE YOUR ORDER

- a) Select item
- b) click "Add to Cart" - repeat for all items needed
- c) click "Continue Shopping" to add more items  
**OR** click the orange "CHECK OUT" box when finished shopping
- d) **\*\*\*DO NOT CLICK SUBMIT ORDER\*\*\***
- e) **PACKING SLIP NOTES:** input YOUR NAME, FUND & ORG# and any other notes. This will appear on the packing slip.
- f) **Click UPDATE CART to save the Packing Slip Notes**
- g) Click "Download PDF Versions" or "Print" to a PDF
- h) Save file with your name.
- i) **EMAIL PDF of shopping cart or order sheet as instructed by your Order Coordinator OR building AU (Authorized User).**

## 5) SEARCHING FOR LIKE ITEMS

Include the 'brand name' or 'MFR #' (manufacturer's #) when searching for comparable Staples Advantage items to what you were used to ordering through staples.com, Office Depot or other office supply sites.

## 6) RESTRICTED ITEMS **\*\*\*Many restricted items ARE ALLOWED to be purchased.**

You may encounter a pop-up message that indicates that an item is BLOCKED however, **many restricted items are allowed to be purchased.** Items are restricted by 'category' and have to be unblocked one at a time. Contact your AU or Cathy Heckman about getting an item unblocked.

**These items CANNOT be unrestricted and have to be ordered through another source.**

*CASES OF PAPER used in NETWORK COPIERS, PRINTERS and FAX MACHINES*

*COMPUTERS, COMPUTER EQUIPMENT, PRINTERS & FAX MACHINES*

*FURNITURE*

*MEDICINE*

*PHONES & PHONE EQUIPMENT*

*PRINTERS/FAX MACHINES INKS & TONER CARTRIDGES*

## **7) CONTRACT REQUIREMENTS**

- Target Annual Spend for SMU office supplies: \$450,000
- Average Order Size: \$275 quarterly university wide
- Minimum Order Size: \$275 per order & per drop point
- Direct billing: Line item charges will be allocated to budget center codes and cannot be split between different ORG #s.
- Orders will be placed in the optimal manner to meet the minimum order size as determine by each building AU.
- Departmental Delivery: One drop point allowed per order. Drop points remain as previously designated for each building.

***Reference “Registration” page and  
“Welcome Email” screen shots below.***

Register for Online Ordering

- \* **SMU Shoppers are registering for access to SHOP & BROWSE.**
- \* **Orders are placed by Building AUs (Authorized Users).**

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.

\* First Name:

\* Last Name:

\* Phone:  -  -  X

\* Email:  **SMU email addresses only - no personal emails**

- \*\*\* 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.

Submit

Hello Cathy Heckman

## Welcome to Online ~~Ordering!~~

**Ordering just got easier with your new online purchasing program.** Staples Business Advantage makes ordering quick and hassle-free and you'll have your shipment exactly when and where you need it. Ready to get started?

Staples Business Advantage can be accessed at [StaplesAdvantage.com](http://StaplesAdvantage.com). Don't forget to bookmark this page for even easier access.

Here is everything you need to log in:

<b>Account Number:</b>	1823718
<b>User ID:</b>	<a href="mailto:CHECKMAN@SMU.EDU">CHECKMAN@SMU.EDU</a>
<b>Password:</b>	Staples1 (Passwords are case sensitive. You will be required to change this password the first time you log in.)
<b>Your approver:</b>	Cathy Heckman***Approval will <u>not</u> be asked for unless order is over \$5000.

\* **SMU Shoppers are registering for access to SHOP & BROWSE.**

\* **Orders are placed by Building AUs (Authorized Users).**

**Live link to access the correct site. Bookmark this page**

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

**User ID is the SMU email address you enter on the registration page.**

**This will be a temporary password. You must change the temporary password the first time you log in**

### Tips for Getting Started

Click [here](#) to access the Customer Service page to find Quick Reference Guides and learn how easy it is to navigate the site and place orders.

Experience easy ordering at Staples Business Advantage. Orders placed and approved by 5:00 pm will help ensure next-business-day delivery of your items. Save time, money and energy by consolidating multiple small orders into fewer large ones.

### Technical Help

The Technical Support team is available via email at [Support@staplesadvantage.com](mailto:Support@staplesadvantage.com). Visit the Customer Service page on Staples Business Advantage for additional support.