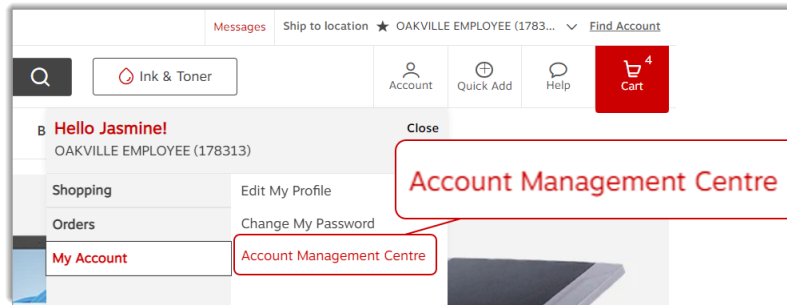




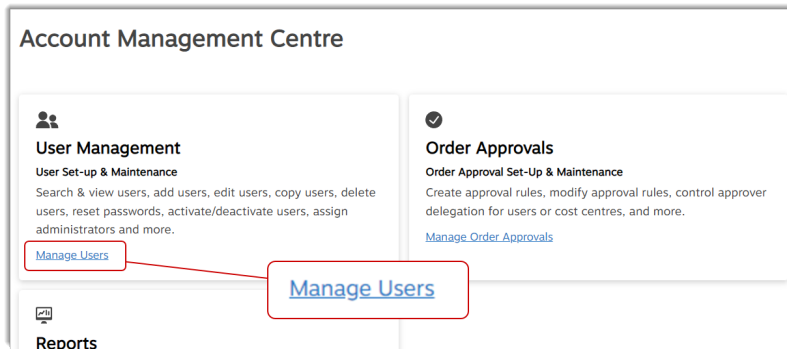
Access the Account Management Centre

- From the **Account** menu, select the **My Account** tab and click on option **Account Management Centre**.



User Management

- From the **User Management** tile, click on the **Manage Users** blue link.



Search for an existing user account

- To use any administrative option in the **User Management** page, you must first find the user you wish to modify.
- Enter the text you are looking for in the search field above the list.
 - The number of existing users in the list is displayed in brackets to the right of the page title.
 - This number varies when a search or filter is applied.

Account Management Centre > User Management

User Management (2111)

[+ Add User](#)
[Assign Admin](#)
[Filters](#)

	Name	User Id	Cost Centre	Ship To Account	Administrator
<input type="checkbox"/>	Conor Carcen	stpcarenc	TORONTO PARENT	178313	SBA User EWAY.CAEWAY.CAE EWAY.CAEWAY.CAE EWAY.CAEWAY.CAE EWAY.CAEWAY.CAE EWAY.CAE EWAY.CAE
<input type="checkbox"/>	Corporation Delta	demodelta	TORONTO PARENT	178311	SBA User EWAY.CAEWAY.CAE EWAY.CAEWAY.CAE EWAY.CAEWAY.CAE EWAY.CAEWAY.CAE EWAY.CAEWAY.CAE EWAY.CAE
<input type="checkbox"/>	cost centerimport	testcostcenterimport	MAIN-SBA TEST/DEMO ACCT 5	178314	

- Use column headings to sort the contents of the list in ascending or descending order.

Filter the list

- Filter by Active or Inactive user statuses, or All.
- Filter by administrator assignment, Select one of the following choices:
 - All Users (assigned to an administrator or not)
 - All Assigned Users
 - Administered By Me
 - Administered By Others
 - Unassigned
- Click on **Done** or **Clear** to apply a new filter.

×

Filter

Status

All

Active

Inactive

Administrator Assignment

All Users

▼

Done

Clear



View User

You can query a user by clicking on the user's blue name in the results list.

User Management (2211)					
Search Users					
+ Add User Assign Admin Filters					
	Name	Cost Centre	Ship To Account	Administrator	
<input type="checkbox"/>	Doug MacPherson				
<input type="checkbox"/>	Douglas Campbell				
<input type="checkbox"/>	Dren Bushi	TORONTO PARENT	178302		
<input type="checkbox"/>	Dron Sharma	TORONTO PARENT	178302		
		TORONTO PARENT	178314		
	Dron Sharma@staples.ca	MAIN-SBA TEST/DEMO ACCT	178314	Joseph Mignella	
		5			

- The user file opens and allows you to view the user's information in 4 separate sections.
 - At the top of the form, you can click the **Edit User** button to make changes.
 - This button automatically redirects you to the **General Information** step of the **Edit User** page.
 - Click the **Actions** button to reach all the other administrative options available.
 - The **Edit** link also appears in each section to allow you to make changes to that specific step.
 - This link automatically redirects you to the corresponding step.
 - In the **Settings** section, you can click on the name of the blue **Approval Group** to see its details.

Jasmine Miller

Edit User **Actions** **Edit User** **Actions**

General Information

Personal Information
First Name: Jasmine
Last Name: Miller
User ID: C000000003
Title:
Preferred Language: French

Contact Information
Email Address: c000000003@staples.com
Secondary Email:
Phone Number: 416-440-8449
Fax Number:

Admin Information
Administrator: Jasmine Miller
Date Created: July 26, 2020
Created By: mgm@staples.com
Last Modified: July 26, 2020
Last Modified By:
Last Login: July 26, 2020

Ship To Accounts **Edit** **Edit**

Search Ship To Account

	Cost Center	Name	Address	Default Ship To Account
178406	MONTREAL	MONTREAL ENFERC	1616 OFFEL BOUCHERVILLE, QC, H2E1W1	Default Ship To Account

Identify when the Default Ship To Account is used
Do not use Default Ship To Account (Default will be most recently used Ship To Account).

Payment and Credit Card Information **Edit** **Edit**

Can add credit card information to their profile: Yes
Can share credit cards with other users: Yes
Can enter credit card during checkout: Yes

Preferred payment method: On Account

Settings **Edit** **Edit**

Send order confirmation by email: Yes
Can update backorders: Yes
Can manage their profile: Yes
Can change their password: Yes
Can access "Forgot Password" page prior to login: Yes
Can access "Account Search" page: Yes
Can access "Manage Users" (No - Regular Buyer)
Default Order History setting: 30 Days order history
Merge same products into 1 line on Shopping Cart: No

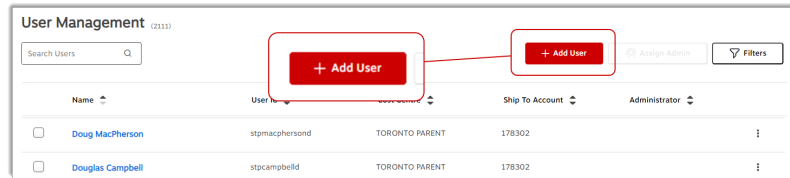
If orders submitted by this user require an approval, the following approval group will perform the approval

Approval Group: None **Approval Group** **None**

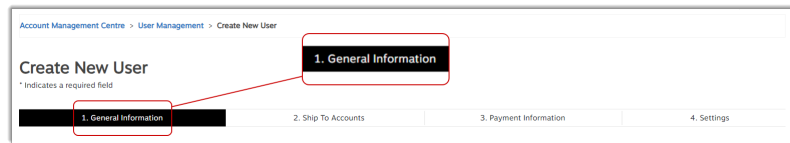


Add a user

From the **User Management** page, click on the **+ Add User** link located above the existing users list.



Creation Step 1 - General Information



- Enter the buyer's general information :
 - First Name** - this field is mandatory.
 - Last Name** - this field is mandatory.
 - User ID** - used to open a shopping session on eway.
 - Title**
 - Preferred Language**
 - Email Address**
 - Secondary email Address**
 - You can enter several addresses in this field separated by a semicolon ";"
 - Phone number**
 - Fax Number**
- Administered By** - By default you are set as this buyer's administrator.
 - You can select another name from the drop-down list.
- Check **Send email notification to user** to have the new buyer receive their user ID and password automatically once their account is completed.
- Click on **Next**.

General Information

First Name *

Last Name *

User ID *

Title (Optional)

Preferred Language (Optional)

English

Email Address *

Secondary Email Address (Optional)

Phone Number

Fax Number (Optional)

Administered By *

Jasmine Miller

☐ Send email notification to user (Includes User ID and Password) (Optional)

Previous

Cancel

Next



Add a user

Creation Step 2 - Ship To Accounts

Account Management Centre > User Management > Create New User

Create New User

* Indicates a required field

1. General Information 2. Ship To Accounts 3. Payment Information 4. Settings

- Select the ship to accounts that will be available to the new buyer.
- To add individual accounts, enter a partial or full account number in the search field.
 - Matching results are displayed.
 - Check the box of the ship to accounts you wish to make available to the new user.
 - The address and the cost centre are indicated under the number of each ship to account.

Ship To Accounts

Q 178

☐ MONTREAL
178406
1616 EIFFEL, BOUCHERVILLE QC, J4B7W1
cost center: MONTREAL

☒ VICTORIA EMPLOYEE
178321
1616, TEST, VICTORIA, BC, V6A3P5
cost center: VICTORIA EMPLOYEE

☐ ST-LAURENT
178407
* ENTRER L'ADRESSE *. BOUCHERVILLE OC. J4B8N3

Add (2)

- To give access to all ship to accounts, click on the **Add all accounts** button, located on the right, above the list of ship to accounts.
 - You can check the box in the first column of the ship to account list header to remove all added accounts in the list and click the **Remove Selected** button.
- Set the default ship to account to continue.
 - After adding one or more ship to accounts, click the blue link of the account that should be set as default for the user.
 - The blue **Set as Default** link automatically turns gray after being selected.
 - This step is mandatory to continue creating the user.

Search Ship To Account

Remove Selected Add All Accounts

<input type="checkbox"/>	ID	Cost Center	Name	Address	Default Ship To Account
<input checked="" type="checkbox"/>	178321	VICTORIA EMPLOYEE	VICTORIA EWAY.CA	1616, TEST, VICTORIA, BC, V6A3P5	Set as Default
<input checked="" type="checkbox"/>	178304	10NTO ACCT CREDIT CARD	CAMBRIDGE EWAY.CA	123 FAKE ST, CAMB N2T2M6	Set as Default



Add a user

Creation Step 2 - Ship To Accounts

- Select the way the default ship to account will be used.
 - Do not use Default Ship To Account.
 - With this option, the default Ship to account selected will be the one the buyer used during his last shopping session.
 - Use Default Ship To Account when user logs on.
 - Use Default Ship To Account when user creates a new Shopping Cart.
- Click on **Next**.

Identify When the Default Ship To Is Used*

☒ Do not use Default Ship To Account (default will be most recently used Ship To Account)

☐ Use Default Ship To Account when user logs on

☐ Use Default Ship To Account when user creates a new Shopping Cart

Add a user

Creation Step 3 - Payment and Credit Card Information

Account Management Centre > User Management > Create New User

Create New User

* Indicates a required field

1. General Information 2. Ship To Accounts 3. Payment Information 4. Settings

- Enable the user to add credit card information to his profile or not.
 - If you select **Yes**, you can add yourself a credit card to the buyer's profile.
 - The buyer may also add, edit or delete credit cards from their profile.
- Enable the user to share credit cards with other users or not.
- Enable the user to enter a credit card during checkout or not.
- Define the default payment method.
 - The buyer will be able to modify this setting in his profile.
- Click on **Next**.

Payment and Credit Card Information

Allow User To

Add Credit Card information to their profile? ☒

Share Credit Cards with other users? ☐

Enter credit card during checkout? ☒

Preferred payment Method*

None*

Card Number*

Card Holder Name*

Expiration Date*

Month/Year

Add Card

Previous Cancel



Add a user

Creation Step 4 - Settings

- Set all settings for the new user using the appropriate toggle button for each setting.

- If you want the new user to have access to **User Management**, you must grant him intermediate or advanced user status. Otherwise, select **No - Regular Buyer** from the drop-down list.
 - Yes - Advanced User** - has full access to all **User Management** options, including these special features:
 - The users list on the **User Management** page contains all existing users.
 - In creation and edit mode, the **Administered by** drop-down list in the **General Information** step contains all users under the main account including their own name.
 - Yes - Intermediate User** - has access with the following restrictions:
 - The list of users on the **User Management** page contains only users they administer.
 - In creation and edit modes, the **Administered by** drop-down list of the **General Information** step always contains they name and it cannot be modified.
 - In the **Settings** step, in creation and edit modes, they cannot set a user as Advanced, only Intermediary or without access to management.



Add a user

Creation Step 4 - Settings

- You can assign the buyer to an **Approval Group**.
 - This assignation determines the applicable approval rules and which approvers are responsible for approving or rejecting the orders.
 - Select an approval group from the list.
 - For customers whose approval groups are not set up by Ship-To account, the Approval Group drop-down list will not display approval groups by Ship-To account.
 - The message that notifies that the organization's account is configured with approval groups by Ship-To account will only appear for users whose account is configured as such. For other accounts, the message will not be displayed.
 - To view the details of the selected group, click the red link below the drop-down list.
- Click on **Create User** to complete the new user creation.

Order Approval

If orders submitted by this user require an approval, the following Approval Group will perform the approval.

Approval Group

None ▼

[View the selected Approval Group's details](#)

Previous

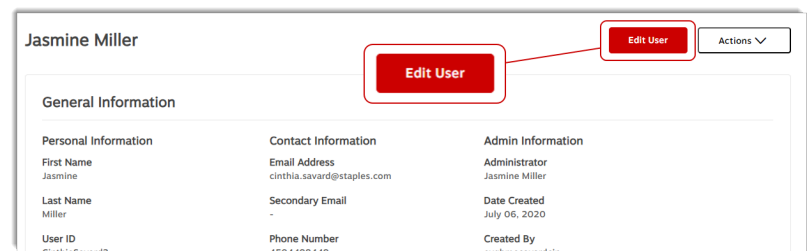
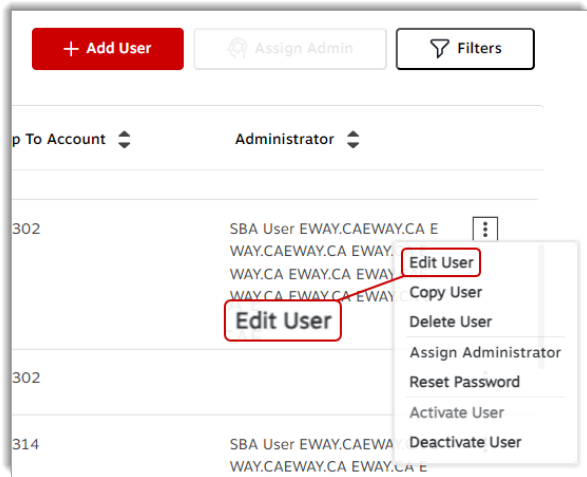
Cancel

Create User

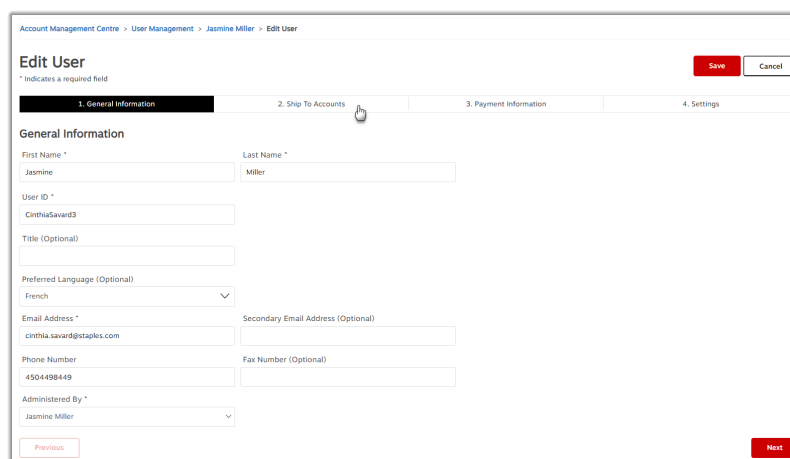
Other Administrative Features

Edit User

- Click the ellipsis (...) menu for a user and select the **Edit User** option.
- Or view a user by clicking on their blue name in the results list.
- Click the **Edit User** button.



- The **Edit User** page opens, and the header displays the 4 steps, just like when creating a user.
- Click on the header tiles to navigate from step to step.
- You can also use the **Next** and **Previous** buttons to navigate from one step to another.
- All user information and settings can be changed.
- Click the **Save** button when your changes are complete.

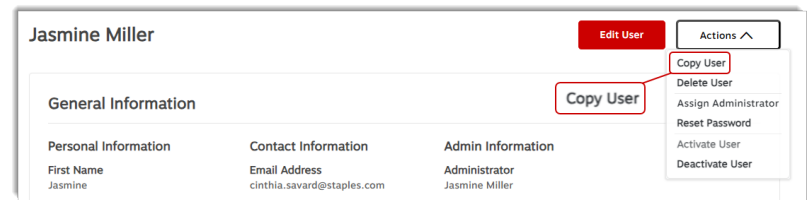
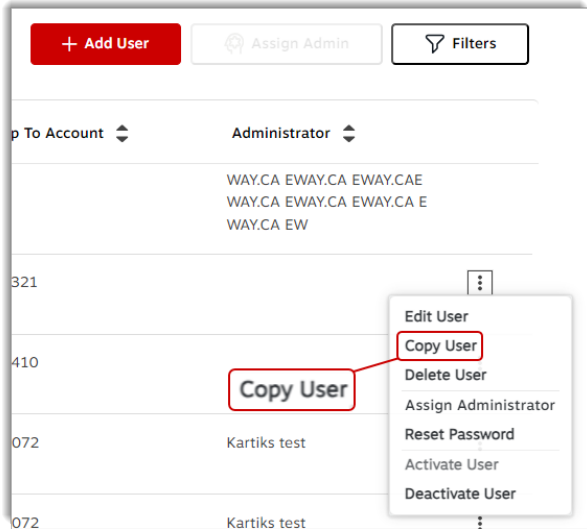



During the modification, if you have made changes to the user file and you click on the breadcrumb trail, a pop-up window will appear to confirm that you wish to stop editing the user. Click Yes to stop editing or No to continue editing.



Copy User

- Click the ellipsis (...) menu for a user and select the **Copy User** option.
- Or view a user by clicking on their blue name in the results list.
 - Click the **Actions** button and select **Copy User**..

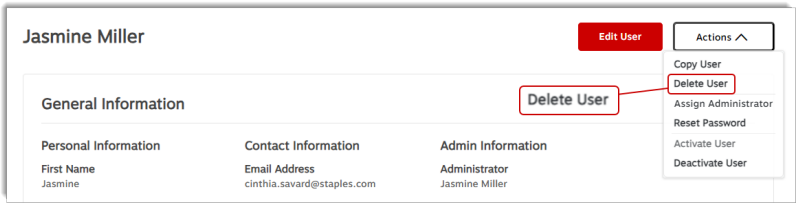
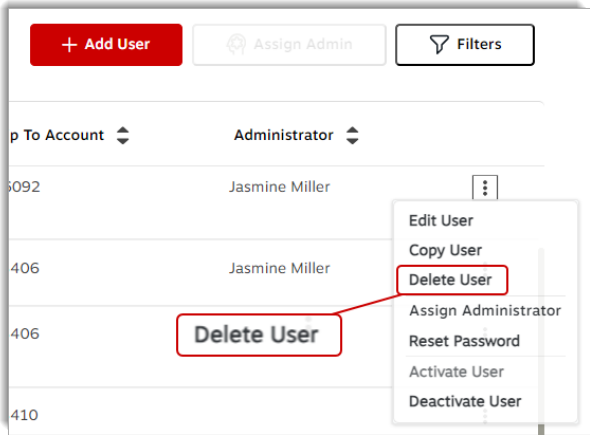


- The creation of a new user opens automatically.
 - **Copy settings from (User Name)** appears in the header.
- Fill in the information from the **1 General Information** step.
- Click the **Next** button.
- The information for steps **2 Ship To Accounts**, **3 Payment and Credit Card Information**, and **4 Settings** have been copied from the user you previously selected.
 - You can modify the information for each step as needed and **Save and Close** to complete the creation of the new user.

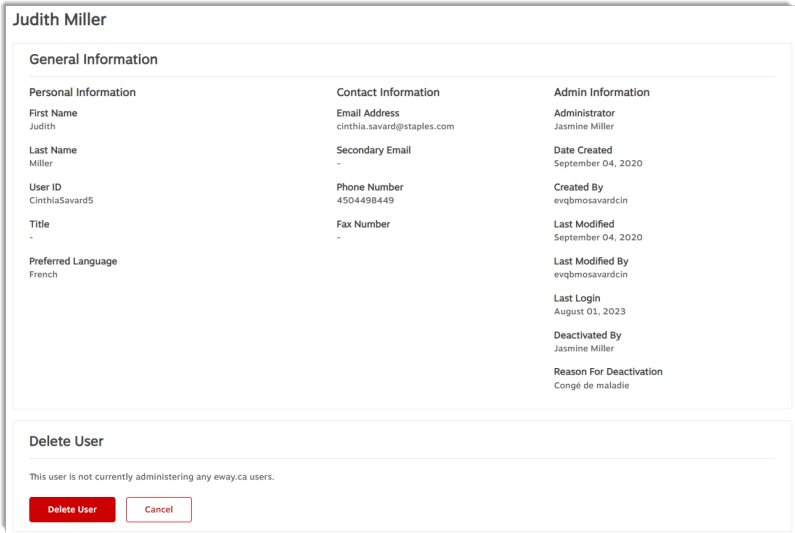


Delete User

- Click the ellipsis (...) menu for a user and select the **Delete User** option.
- Or view a user by clicking on their blue name in the results list.
 - Click the **Actions** button and select **Delete User**.



- The selected user name is displayed as the page title.
- The **General Information** section displays basic static user information.
- In the **Delete User** section, a message is displayed if the selected user is administering other users.
 - In this event, please note that the field Administered by for these users will be deleted.
- Click the **Delete User** button.
 - A message is displayed if the user was successfully deleted.

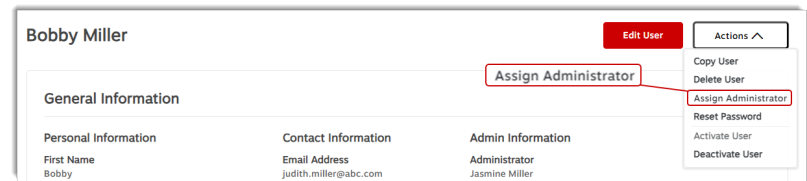
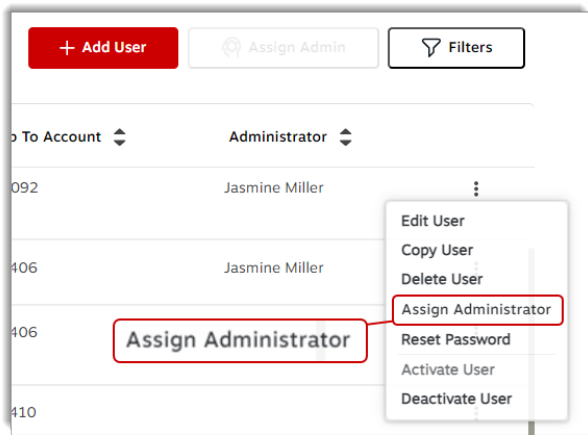




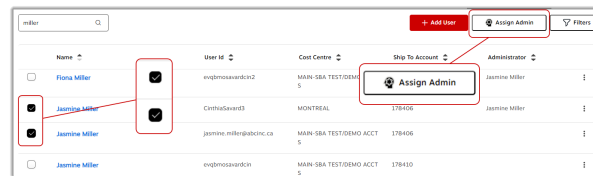
Assign an administrator for one or several users

There are 3 methods to reach the **Set Administered By** page in User Management.

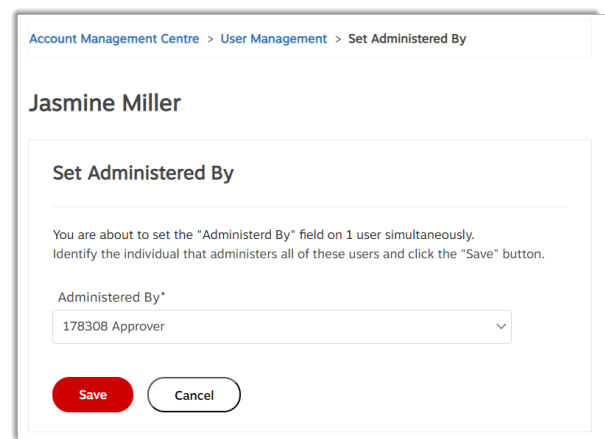
1. Click the ellipsis (...) menu for a user and select the **Assign Administrator** option.
2. Or view a user by clicking on their blue name in the results list.
 - Click the **Actions** button and select **Assign Administrator**.



3. From the results list following a search, check the check box of one or more users to enable the administrator assignment feature.
 - Click on the **Assign admin** button.
 - The **Set Administered By** page opens.



- From the drop-down list, select the administrator to assign to the selected users.
- Click on the **Save** button.
 - A message is displayed, and the **User Management** page opens automatically.

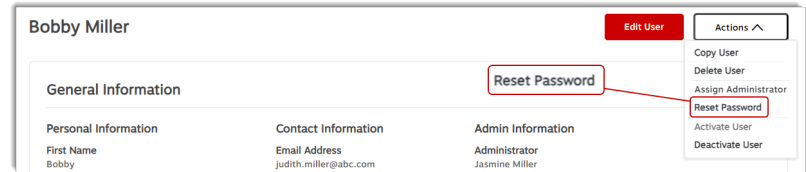
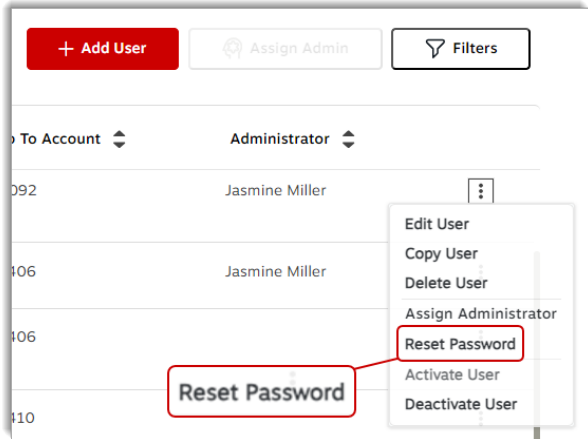


This feature is only available for advanced users.



Reset a User's Password

- Click the ellipsis (...) menu for a user and select the **Reset Password** option.
- Or view a user by clicking on their blue name in the results list.
 - Click the **Actions** button and select **Reset Password**.

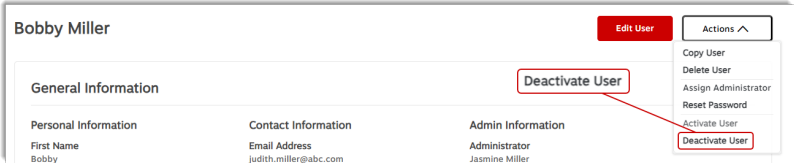
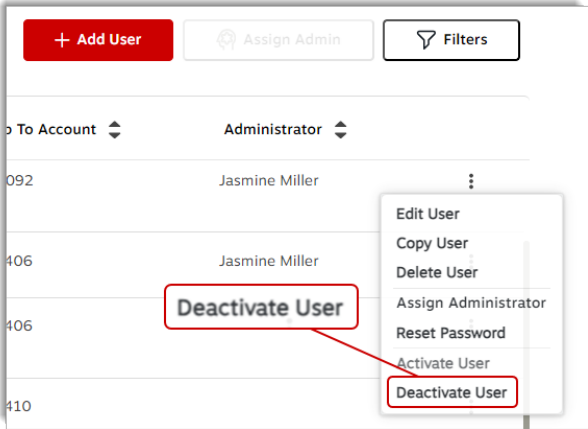


- The selected user name is displayed as the page title.
- The **General Information** section displays basic static user information.
- In the **Reset Password** section, select how the password should be reset.
 - User ID
 - Random Password
- Check the box **Send password to user by email**, so that the user is notified by email of his password reset.
- Click the **Reset Password** button.
 - A message is displayed to let you know that the password has been reset successfully.

This screenshot shows the 'Reset Password' form for 'Bobby Miller'. The form is divided into two sections: 'General Information' and 'Reset Password'. The 'General Information' section displays user details: User ID (bobmiller), Email Address (judith.miller@abc.com), Phone Number (5148546324), Administrator (Jasmine Miller), Status (Active), Last Login Date (July 10, 2023), and Last Password Change Date (July 10, 2023). The 'Reset Password' section contains a message: 'Resetting the password will assign a temporary password to the user. When the user logs into eway.ca, they will be prompted to change their password.' Below this message is a dropdown menu labeled 'Reset User Password To' with 'User ID' selected. There is a checkbox labeled 'Send password to user by email' which is checked. At the bottom of the form are two buttons: 'Reset Password' and 'Cancel'.

Deactivate User

- Click the ellipsis (...) menu for a user and select the **Deactivate User** option.
- Or view a user by clicking on their blue name in the results list.
 - Click the **Actions** button and select **Deactivate User**.



- The **General Information** section displays basic static user information.
- The **Reason for deactivation** field is mandatory.
- Click on the **Deactivate User** button.
 - A message is displayed in the header if the user was successfully deactivated.



This option is only available if the status of the selected user is **Active**.

Fiona Miller

General Information

Personal Information

First Name

Fiona

Last Name

Miller

User ID

evqbmossavardcin2

Title

test

Preferred Language

French

Contact Information

Email Address

cinthia.savard@staples.com

Secondary Email

-

Phone Number

4504498449

Fax Number

-

Admin Information

Administrator

Jasmine Miller

Date Created

January 14, 2020

Created By

evqbmossavardcin

Last Modified

January 14, 2020

Last Modified By

evqbmossavardcin

Last Login

June 21, 2020

Deactivate User

Deactivating the user will take effect immediately.

The user will not be able to access eway.ca until you re-activate them.

Reason for Deactivation*

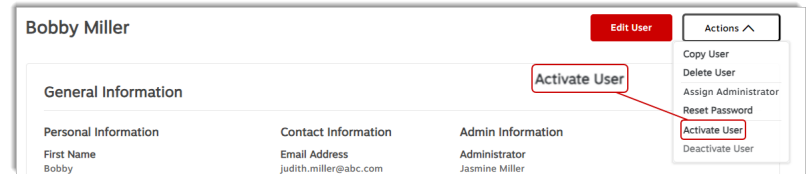
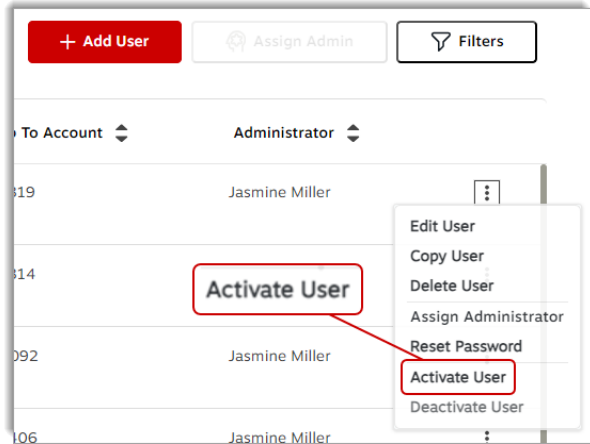
Deactivate User

Cancel



Activate User

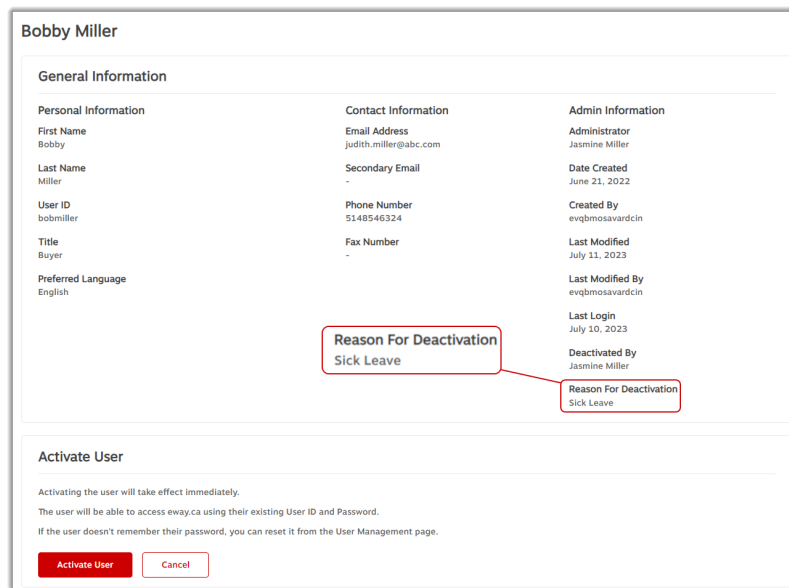
- Click the ellipsis (...) menu for a user and select the **Activate User** option.
- Or view a user by clicking on their blue name in the results list.
 - Click the **Actions** button and select **Activate User**.



- The **General Information** section displays basic static user information, including the **Reason for deactivation**.
- Click **Activate User**.
 - A message is displayed in the header if the user was successfully activated.



This option is only available if the selected user has already been deactivated.



The masculine gender is used throughout this document without bias, in the interest of simplicity and ease of reading.