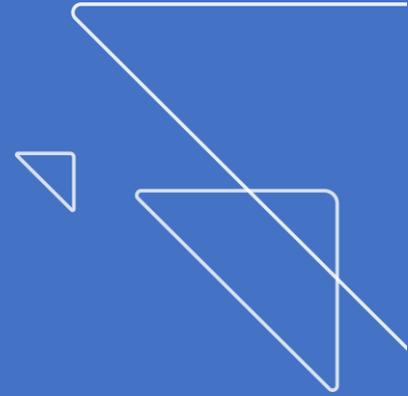




Promotional Merchandise eStore **Financial Approver User Guide**

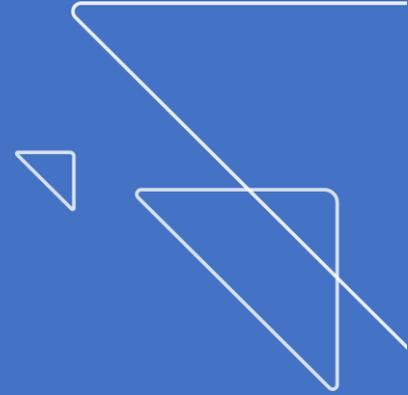




Welcome to the Promotional Merchandise eStore Financial Approver User Guide

We're excited to introduce the new formulary eStore. The user experience has been greatly improved and we've refreshed and expanded the merchandise offering to include new and fun products!

This **how to guide** will provide instructions for **Financial Approvers** regarding reviewing and approving orders.





Formulary Merchandise

Special Request

Special Request Form

Help Center

My Account

Login

Search...

Go

\$0.00



Formulary
Merchandise

Special
Request

Resource
Center

New Home Page

Welcome to the Home Page!

All shoppers are associated with a Financial Approver.

Each order placed must be reviewed and approved by a Financial Approver.

The new site will perform best when using Chrome or IE11 with Windows 10.



Email Financial Approvers Receive after an Order is Placed

You have been identified as a Financial Approver for a person our group.

For every new order placed by this group you will receive an email notification.

This email provides you with:

1. The order placer's email address
2. A link to access the site in order to review the order

Pending Order Submitted for Approval - Northwell Health



Northwell

To  Hubbard, Brittany

Retention Policy Staples Standard Inbox Cleanup Policy (Cloud) (6 months)

Expires 12/12/2020

Action Items

Order Approval Request Notification

Hi Brittany Hubbard,

1

2

A new order has been submitted by kensey@yopmail.com. Please use this link ([972](#)) to log into your account, review the order and update the status.

Much appreciated,

Northwell Health Customer Service

Northwell@cs.staples.com

888-362-9844

<https://northwell.sppone.corpmerchandise.com>

Shopper Experience: An email is also sent to the shopper informing them their order has been sent to their Financial Approver for review.



Selected Brand: **All Brands** [Change](#)



CUSTOMER LOGIN

Username

Password

Remember Me

[Login](#)

[Forgot Your Password?](#)

New Customer?

Sign-up for an account to get quick checkout, address books and order history.

[Get an account](#)

Northwell Health Financial Approver Logs into the Site

The link in the email will take you directly to the **Login** page for the eStore.

Here, you **login** with your username and password.

If you do not know your password, please use the **Forgot Your Password** link.

If you do not know your username or have issues, please **contact Customer Service**.

Northwell@cs.staples.com
or 888-362-9844 (Prompt 2)



Your Account

Wishlist

You have marked 0 item(s).

[View Wishlist](#)

Order History

Recent Orders:

Summary

	Date	Order Number	Total	
Non-Woven Insulated Shopper Tote Bag Plus 3 other items	05/08/2020	NO-200508-131010-711	\$965.54	Reorder

[Order History](#)

Address Book

[Show Primary Shipping](#)

[Primary Billing](#)

No Address Set

[View Address Book](#)[Add Address](#)**2**

Pending Order Approval History

3[View Pending Order Approval History](#)

Account Profile

Username : mollyv77@yahoo.com

Email Address : mollyv77@yahoo.com

[Edit Profile](#)[Change Password](#)

Accessing Orders for Review and Approval

After you have logged into the eStore, the next step is to access **My Account**.

1. Access **My Account** in the top navigation
2. Navigate down to **Pending Order Approval History** and
3. Click on **View Pending Order Approval History**

This history will have new orders placed as well as orders already approved.



Reviewing a New Order Placed

Pending Order Approval History

Pending Orders

Customer Name ▼ Pending Order Status ▼ Pending Order Amount ▼ Created Date ▼

<< Page 1 / 2 >> | Show 10 ▼ Per Page | ↻

Pending Order ID	Customer Name	Pending Order Status	Pending Order Amount	Created Date	Action
972	Kensley Kensington	APPROVED	\$278.77	06/15/2020	
963	Pam Roling	APPROVED	\$379.23	06/12/2020	
958	Kensley Kensington	APPROVED	\$32.69	06/11/2020	
956	Pam Roling	APPROVED	\$68.59	06/11/2020	
937	Kensley Kensington	APPROVED	\$145.65	06/08/2020	
934	Pam Roling	PENDING APPROVAL	\$308.16	06/08/2020	
924	Molly Virgin	APPROVED	\$408.47	06/04/2020	
923	Molly Virgin	APPROVED	\$136.16	06/04/2020	
899	Molly Virgin	APPROVED	\$140.47	05/29/2020	

<< Page 1 / 2 >> | Show 10 ▼ Per Page | ↻



In **Pending Order Approval History** a list will feature all orders placed by those in your Financial Approver group.

This includes requests that are **Pending Approval** and those that are **Approved**.

Navigate to those with a status of **Pending Approval**.

Click on **Action**.





Formulary
Merchandise

Special
Request

Special Request
Form

Help
Center

My
Account

Log Off

Search...

Go

Pending Order Detail # 1243 - Northwell Health on 8/21/2020 1:41:08 PM

See Approver History

Shipping Address

Lenox Hill Hospital
Lenox Hill Hospital
Receiving Department
100 E 77TH ST
NEW YORK, NY, US 10075-1850
Ph: 555-555-5555

1

Additional Information

What is the project name? : Test

Item(s)	Description	Item Price	Quantity	Total
28 Oz. Tritan Wave Bottle Trans Green 		\$4.88	25	\$122.00
View Customization +				
<i>NOTE: All sales are final for items that have been ordered with customization.</i>				
15" Trails Computer Backpack Charcoal 		\$32.41	12	\$388.92
View Customization +				
<i>NOTE: All sales are final for items that have been ordered with customization.</i>				
Sub Total				\$510.92
Tax				
Order Total				\$556.26
Payment			Bill My Department	

Approver Comments (optional)

See Approver History

Approve And Place Order

Edit Order

Reject

2

3

4

Reviewing an Order

By clicking **Action** you can see an individual's order.

As a Financial Approver you will:

- Review the order details like:
 - Shopper
 - Shipping address
 - Billing details
 - Products
 - Quantity
 - Price and Total
- Click **Approve and Place Order** OR
- Click **Edit Order** OR
- Click **Reject**



Approving an Order

Pending Order Approval History

Pending Orders

Customer Name ▼ Pending Order Status ▼ Pending Order Amount ▼ Created Date ▼

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Pending Order ID	Customer Name	Pending Order Status	Pending Order Amount	Created Date	Action
1414	Pam Roling	REJECTED	\$72.00	09/15/2020	
1413	Pam Roling	APPROVED	\$132.46	09/15/2020	
1412	Pam Roling	PENDING APPROVAL	\$466.56	09/15/2020	
1365	Pam Roling	PENDING APPROVAL	\$186.35	09/09/2020	
1364	Pam Roling	PENDING APPROVAL	\$905.02	09/09/2020	
1243	Beth Harkonen	APPROVED	\$556.26	08/21/2020	
1227	Beth Harkonen	PENDING APPROVAL	\$288.00	08/17/2020	
1225	Beth Harkonen	PENDING APPROVAL	\$381.66	08/17/2020	
1207	Beth Harkonen	APPROVED	\$2,516.70	08/12/2020	
1199	Beth Harkonen	REJECTED	\$1,317.00	08/11/2020	

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After clicking **Approve and Place Order** you will be taken back to the list of orders and see the order status has changed to **APPROVED**.

Shopper Experience: An email is sent to the shopper informing them their order has been approved and will be processed (order confirmation).



Proceed To Checkout

PAYMENT METHOD

- Bill My Department
 Mather Hospital Only
 South Oaks Hospital Only

BILLING ADDRESS

Beth Harkonen
Staples
8610 PAGE AVE
SAINT LOUIS, MO, US 63114-6112
Ph: 3146923127
Email: bethharkonen@yopmail.com

SHIPPING ADDRESS

Search For Shipping Address

Receiving Department
Lenox Hill Hospital
100 E 77TH ST
NEW YORK, NY, US 10075-1850
Ph: 555-555-5555
Email: bethharkonen@yopmail.com

SHIPPING METHOD

- Ground Delivery - \$0.00
 2 Day Air Delivery - \$119.04
 Next Day Air Delivery - \$139.48

Approve And Place Order

Cancel

SUMMARY

Have A Promo Code?

Apply

Sub Total	\$510.92
Tax	\$45.34
Order Total	\$556.26

IN THE CART

 28 Oz. Tritan Wave Bottle
Color Trans Green
Unit Price \$4.88
Qty Update Qty
Price \$122.00

Edit

NOTE: All sales are final for items that have been ordered with customization.

Remove Item

 15" Trails Computer Backpack
Color Charcoal
Unit Price \$32.41
Qty Update Qty
Price \$388.92

Edit

NOTE: All sales are final for items that have been ordered with customization.

Remove Item

Additional Information

What is the project name? *

What is the project name? (i.e. Nurse's Week)

Editing an Order

When **EDITING** and order, you will be taken to a checkout page where you can edit the following fields on the order:

1. Quantity ordered
2. Additional Information such as Business Unit, Department Number, Project name, etc.

Once the necessary edits have been made, click **Approve and Place Order**.



Record updated successfully. ✕

Pending Order Approval History

Pending Orders

« Page 1 / 4 » Show 10 Per Page |

Pending Order ID	Customer Name	Pending Order Status	Pending Order Amount	Created Date	Action
1414	Pam Rolling	REJECTED	\$72.00	09/15/2020	
1413	Pam Rolling	PENDING APPROVAL	\$132.46	09/15/2020	
1412	Pam Rolling	PENDING APPROVAL	\$466.56	09/15/2020	
1365	Pam Rolling	PENDING APPROVAL	\$186.35	09/09/2020	
1364	Pam Rolling	PENDING APPROVAL	\$905.02	09/09/2020	
1243	Beth Harkonen	APPROVED	\$556.26	08/21/2020	
1227	Beth Harkonen	PENDING APPROVAL	\$288.00	08/17/2020	
1225	Beth Harkonen	PENDING APPROVAL	\$381.66	08/17/2020	
1207	Beth Harkonen	PENDING APPROVAL	\$2,516.70	08/12/2020	
1199	Beth Harkonen	REJECTED	\$1,317.00	08/11/2020	

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Shopper Experience: An email is sent to the shopper informing them their order has been approved and will be processed (order confirmation).

Editing an Order

A green bar will flash momentarily notifying the record was updated successfully.

The status of the order will be updated to say **APPROVED**.



Rejecting an Order

Pending Order Approval History

Pending Orders

Customer Name ▼ Pending Order Status ▼ Pending Order Amount ▼ Created Date ▼

« Page 1 / 4 » Show 10 Per Page |

Pending Order ID	Customer Name	Pending Order Status	Pending Order Amount	Created Date	Action
1414	Pam Roling	REJECTED	\$72.00	09/15/2020	
1413	Pam Roling	APPROVED	\$132.46	09/15/2020	
1412	Pam Roling	PENDING APPROVAL	\$466.56	09/15/2020	
1365	Pam Roling	PENDING APPROVAL	\$186.35	09/09/2020	
1364	Pam Roling	PENDING APPROVAL	\$905.02	09/09/2020	
1243	Beth Harkonen	APPROVED	\$556.26	08/21/2020	
1227	Beth Harkonen	PENDING APPROVAL	\$288.00	08/17/2020	
1225	Beth Harkonen	PENDING APPROVAL	\$381.66	08/17/2020	
1207	Beth Harkonen	APPROVED	\$2,516.70	08/12/2020	
1199	Beth Harkonen	REJECTED	\$1,317.00	08/11/2020	

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After an order is **Rejected**, you will be taken back to the list .

The status of the order will be updated to say **REJECTED**.

Shopper Experience: An email is sent to the shopper informing them their order has been rejected.





Thank you!

We hope you find this Northwell Health Promotional eStore User Guide helpful to learn about the exciting changes we've made to enhance the Financial Approval process.

If you have any questions about reviewing orders, please connect with us.

Contact:

Northwell@cs.staples.com

800-362-9844 (prompt 2)

