

Create and Manage Purchase Orders. For Administrator Use Only.

Welcome to School Specialty Online! Below are some instructions to help **only Administrators create and manage Purchase Orders**. If you are not an administrator, please do not refer to the instructions below.

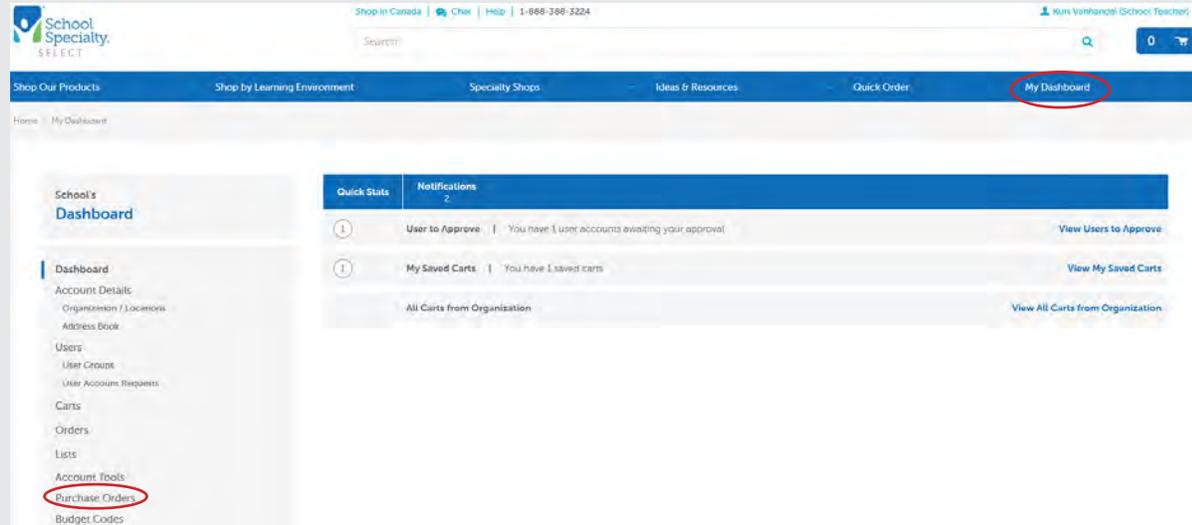
School Specialty Online gives website Administrators the ability to enter purchase orders, enter an allocated amount, and assign them to their online users. It is most commonly used to ensure no user can overspend their budget amount.

Login:

- Visit select.schoolspecialty.com.
- Under **Account Sign In** enter your Username and Password, click **SIGN IN**

Access Your Users:

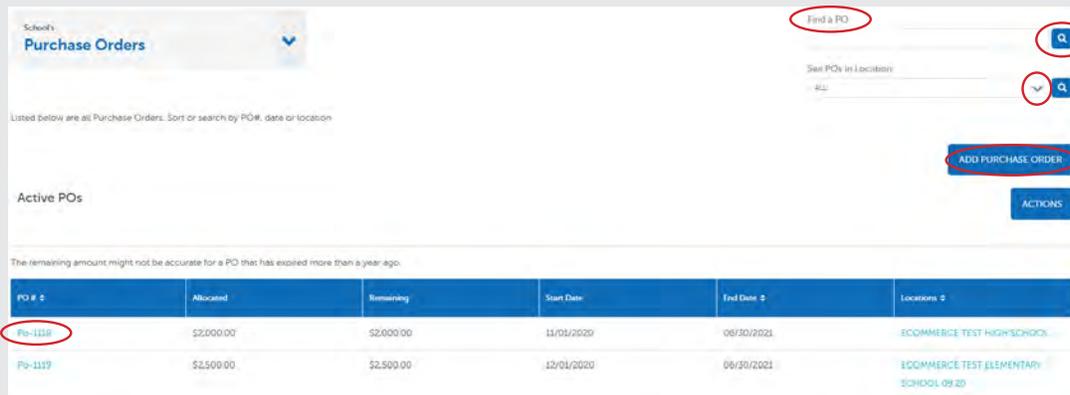
- Click on **My Dashboard** in the top right navigation tab
- Click on **Purchase Orders**



The screenshot shows the School Specialty SELECT website interface. At the top, there is a navigation bar with the School Specialty SELECT logo on the left and a search bar on the right. Below the navigation bar, there are several tabs: "Shop Our Products", "Shop by Learning Environment", "Specialty Shops", "Ideas & Resources", "Quick Order", and "My Dashboard". The "My Dashboard" tab is circled in red. Below the navigation bar, there is a sidebar on the left with a "Dashboard" section containing links for "Account Details", "Organization / Locations", "Address Book", "Users", "User Groups", "User Account Requests", "Carts", "Orders", "Lists", "Account Tools", "Purchase Orders", and "Budget Codes". The "Purchase Orders" link is circled in red. The main content area shows a "Quick Stats" section with "Notifications" (2) and a list of items: "User to Approve" (1), "My Saved Carts" (1), and "All Carts from Organization".

Access Your Users: (continued)

- Your list of Purchase Orders will display showing the amount allocated, amount remaining, start and end date, and the location to which it's assigned
 - Search for Purchase Orders by number or location
 - Click any Purchase Order number to view the Purchase Order details, description, amount, start and end date, users assigned, and all orders associated with this Purchase Order



PO #	Allocated	Remaining	Start Date	End Date	Location
PO-1116	\$2,000.00	\$2,000.00	11/01/2020	06/30/2021	ECOMMERCE TEST HIGH SCHOOL
PO-1117	\$2,500.00	\$2,500.00	12/01/2020	06/30/2021	ECOMMERCE TEST ELEMENTARY SCHOOL 09 20

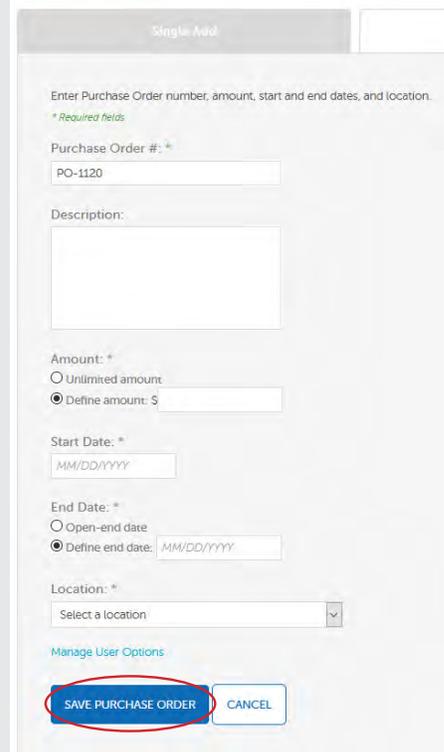
Add a New Purchase Order:

- Click **ADD PURCHASE ORDER**
- Complete the following information and click **SAVE PURCHASE ORDER**
 - Purchase Order # / Description**
 - Amount:** This is the amount allocated to your Purchase Order. Choose **Unlimited amount** if you do not wish to set a spending limit. Choose **Define amount** to choose a limit. Once the limit is reached, this Purchase Order will not be able to be used online by any user. Only orders submitted to School Specialty will be included in the amount spent. Carts in a Saved, Pending Approval, or Rejected status will not be included in the amount spent
 - Start Date:** The date users applied will be able to start choosing this Purchase Order number during checkout
 - End Date:** The date the Purchase Order number will be removed as an option for any user to apply during checkout. **Open-end date PO's do not expire**

Add Purchase Order

Two methods to add Purchase Orders.

[Back to Purchase Orders](#)



Single Add

Enter Purchase Order number, amount, start and end dates, and location.
* Required fields

Purchase Order #: *
PO-1120

Description:

Amount: *
 Unlimited amount
 Define amount: \$

Start Date: *
MM/DD/YYYY

End Date: *
 Open-end date
 Define end date: MM/DD/YYYY

Location: *
Select a location

Manage User Options

SAVE PURCHASE ORDER CANCEL

Add a New Purchase Order: (continued)

- **Location:** This selects the billing location for which this Purchase Order will be available. Choose the school district central office if that is the location to which the invoices should be billed and sent. Choose any individual school if that is the location to which the invoices should be billed and sent. Note: You will only be able to assign the Purchase Order to users which have access to the billing location chosen on the Purchase Order
- **Manage User Options:** Search for and select the users you wish to grant access to use this Purchase Order as a checkout option. Click **ASSIGN**

Editing a Purchase Order:

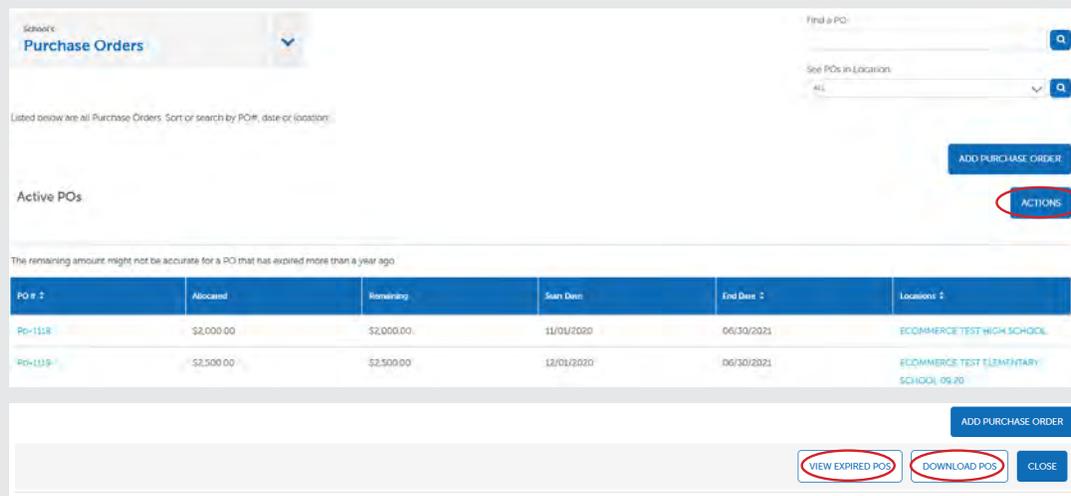
- Click the **Purchase Order number** to edit your information and users assigned. Click **SAVE CHANGES** to complete. Note: You will not be able to change the purchase order number or the billing location associated with the purchase order

Expiring a Purchase Order:

- You will notice there is no delete option for Purchase Orders. This is because there may be valuable order information and history associated with the Purchase Order. Therefore, you can **only expire Purchase Order by choosing an end date**. Once the end date is reached, the Purchase Order number will be removed as an option for any user to apply during checkout

Additional Options:

- Click the **ACTIONS** button to reveal more options
- **VIEW EXPIRED POS:** Allows you access to view and edit expired Purchase Orders
- **DOWNLOAD POS:** This will download a list of all Purchase Orders viewed to an excel spreadsheet



Find a PO:

See POs in Location:

Listed below are all Purchase Orders. Sort or search by PO#, date or location.

Active POs

The remaining amount might not be accurate for a PO that has expired more than a year ago.

PO #	Allocated	Remaining	Start Date	End Date	Locations
PO-1118	\$2,000.00	\$2,000.00	11/01/2020	06/30/2021	ECCOMMERCE TEST HIGH SCHOOL
PO-1119	\$2,500.00	\$2,500.00	12/01/2020	06/30/2021	ECCOMMERCE TEST ELEMENTARY SCHOOL 05-20

ADD PURCHASE ORDER

VIEW EXPIRED POS

DOWNLOAD POS

CLOSE

Questions? Call our Toll Free Online Support Department at **800-513-2465 ext 2**