■ Step 2: Managing Your Account

Learn how to navigate and customize your My Account dashboard.

After logging in, click **My Account** at the top right of your screen to access your personal dashboard. From here, you can view orders, manage users, and control key business tools all in one place.

My Account	Your central hub for quick access to all tools and settings.
Dashboard	Overview of your activity, quick links, and updates.
Profile	Update contact info, password, and company details.
Order History	View, track, and reorder from your past purchases.
Credit Cards	Manage saved payment methods securely.
Product Lists	Access company-wide or personal lists for fast reordering.
Recently Purchased	See what you've ordered most recently.
Saved Carts	Return to carts you've saved for later checkout.
Quick Lists	Create custom supply lists for recurring needs.
Management Tools	Administrative settings for approvals and workflows.
Recurring Orders	Set up automatic deliveries for frequently used products.
Account Overview	View account status, spending, and summary data.
Invoices Due	Check current balances and make online payments.
Users	Add, edit, or remove team members with account access.
Reports	Generate and download purchase or usage reports.

Manage Multiple Locations or Departments

If your organization has more than one department or location, you can easily switch between them using the dropdown at the top of your dashboard. This allows you to view and manage orders, users, and budgets by department — all under one account.

Helpful Tips

• Keep you **Profile** details up to date to ensure smooth communication and accurate billing.
• Check **Order History** before reordering — you might already have an active Recurring Order set up.
• Use **Reports** to monitor department spending or track sustainability goals.
• Use **Quick Lists** and **Saved Carts** for faster ordering cycles.

A complete walkthrough of the My Account dashboard and its key tools.

After logging in, click **My Account** at the top right of your screen. This opens your personalized dashboard — the control center for managing orders, payments, reports, and users. Use this area to stay organized and save time when purchasing supplies for your workspace.

My Account (Home Screen)

Your landing page after login. Shows recent orders, saved carts, and spending summaries. Bookmark this page for quick access every time you log in.

Dashboard

An interactive overview that includes pending orders, top-purchased items, and quick links to tools like Quick Lists and Reports.

Profile

Keep your personal and company details current. Update your name, contact info, password, and default billing or shipping address.

Order History

Find every order ever placed. Search by PO, item, or date, and reorder directly from past purchases. Ideal for recurring supplies.

Credit Cards

Securely store company cards for fast checkout. Add, remove, or assign payment methods by department.

Product Lists

Curated lists of items for easy reordering. Company-wide lists are created by admins; personal lists are user-created.

Recently Purchased

Shows your most recent purchases so you can quickly reorder common products.

Saved Carts

Save partially built carts for later. You can reopen, edit, or share saved carts anytime.

Quick Lists

Custom reorder lists for frequently used items. Create separate lists like 'Office Basics' or 'Breakroom Supplies' for efficiency.

Management Tools

Administrative area for approvals, spending limits, and workflow control. Available to account admins and managers.

Recurring Orders

Automate repeat purchases. Schedule weekly, monthly, or quarterly orders, and adjust them as needed.

Account Overview

A financial snapshot showing total spend, active orders, and year-to-date summaries. Great for budget tracking.

Invoices Due

View and pay outstanding invoices. Includes due dates, amounts, and direct links to PDF invoices.

Users

Manage team access. Add or remove users, set permissions (Admin, Buyer, Approver), and reset passwords.

Reports

Generate and export data on order history, spend analysis, and user activity for budget reviews or sustainability tracking.

Managing Multiple Locations or Departments

If your organization has multiple branches or cost centers, use the dropdown menu at the top of your dashboard to switch between them. This allows each department to manage its own orders, invoices, and budgets while keeping everything under one unified account.

Pro Tips

- Save time using **Quick Lists** and **Saved Carts** for frequent purchases.
- Always check **Recurring Orders** before reordering — it might already be automated.
- Use **Reports** to monitor purchasing trends or departmental budgets.
- Keep **Profile** and **Credit Card** info updated for smoother transactions.