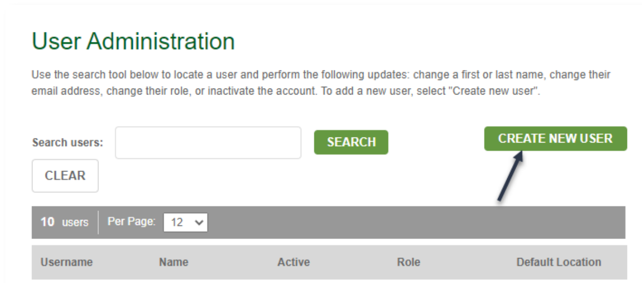
User Administration & Allowance Account Guide

v.1-2021

This guide will help you manage your employees' user accounts and allowance programs. The first section will instruct you on how to set-up users so that your employees can log in to purchase their uniform. The last section will walk you through adding and updating your employees' allowance program so they can use their allowances for their purchase.

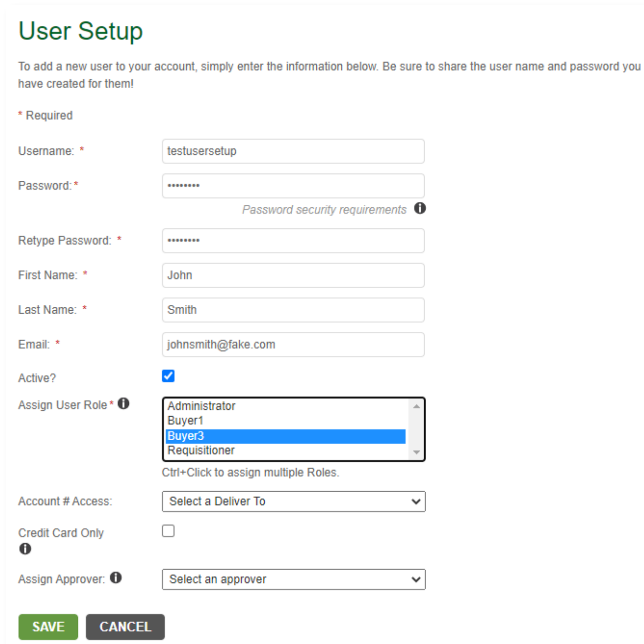
Step 1: User Administration

To add or manage users on your eStore:



- Sign into your account
- Navigate to the MY ACCOUNT at top of the screen
- Visit the USER ADMINISTRATION page
- Select CREATE NEW USER

  NOTE: This page can also be used to make edits to existing user accounts that are tied to your eStore. (Once a user is created, you can re-visit this page to make changes by selecting the existing username in the USER ADMINISTRATION page.)



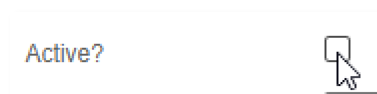
- Fill out the appropriate fields: username, name, and email address

  NOTE: You are not required to assign your employee's approver to be able to administer their user account or allowance program.

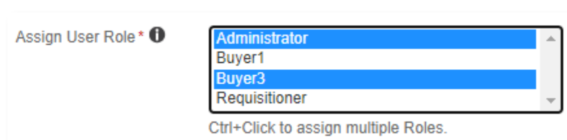
- Select the **Buyer3** User Role
- Leave the **Credit Card Only** checkbox unchecked to ensure your employee can use their allowance program to complete their orders

  NOTE: If your employee spends more than their allowance balance on a given order, they will be automatically prompted to enter their credit card information to pay the remaining balance.

- **Optional:** To deactivate an existing user, uncheck the **Active** checkbox to prohibit the user's access to the account so that they will no longer be able to log in and place orders



- **Optional:** To promote a user's role to Administrator, Ctrl + Click to retain their **Buyer3** access and select Administrator
- Select SAVE to return to the USER ADMINISTRATION page



After the username has been created, you can now apply an allowance balance to their account for them to apply towards their uniform purchase. To proceed with managing your employees' allowance program, visit the ALLOWANCE MANAGEMENT page and follow the steps listed under Allowance Management.

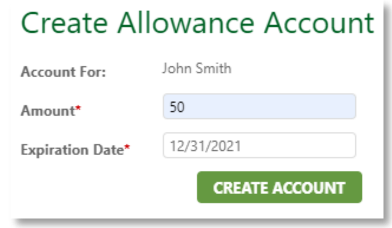
Step 2: Create Users' Allowance Accounts

There are two methods you can use to manage your employees' allowance balances: One at a time or bulk creating and editing accounts using spreadsheet imports.

User Administration & Allowance Account Guide

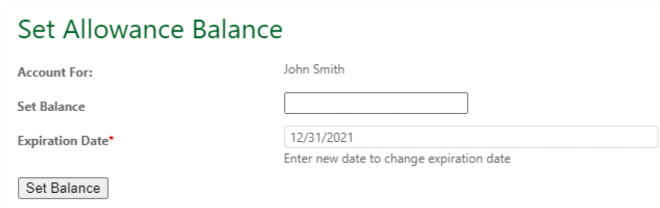
v.1-2021

2A: To manage your employee’s allowance account individually:



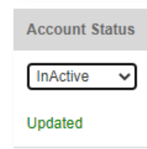
- Select **Create Account** for the username you want to create an allowance balance for

- The options to Add Funds and set an Expiration Date will appear on the pop-up within the page. Enter the necessary information and select CREATE ACCOUNT



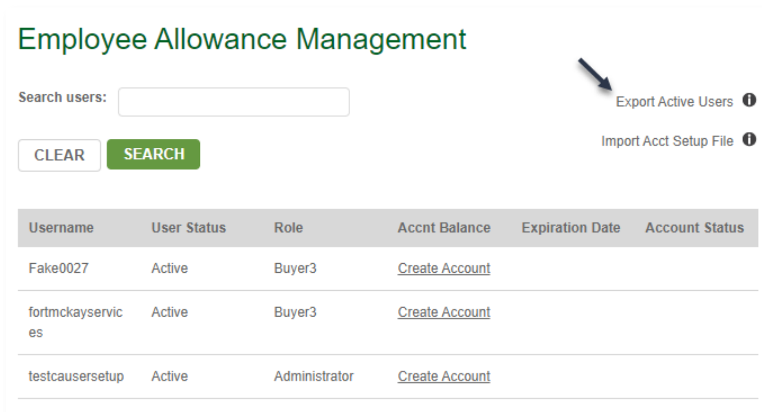
- To edit allowance balances, select the **SET $** button and enter the amount you want the account balance to set at on the pop-up screen. (Note: If you want the amount to be 0, you will simply enter 0.)

- To edit the expiration date of an existing account, set/enter the desired account balance as well as the new date



- To deactivate a user’s allowance, you can also switch the Account Status from **Active** to **Inactive** and select **UPDATE** on the ALLOWANCE MANAGEMENT page drop list.

2B: To manage your employees’ allowance accounts in bulk:



- On the ALLOWANCE MANAGEMENT page, select **Export Active Users**

- Open the .csv file in Microsoft Excel to make the necessary account edits for your employees

  NOTE: You must use a new export file every time you need to make changes to ensure you are using the current state of the allowance program.

- Save the .csv file as a unique .csv file name after you download it and before you make any edits

UserName	Amount	CreationDate	ExpirationDate	IsActive	AllowanceAccountID
Fake0027	50	1/1/2021	12/31/2021	T	
testcausersetup	100	1/1/2021	12/31/2021	T	

- Open your new .csv file in Microsoft Excel to make the necessary account edits for your employees:

  Amount: Enter the exact amount you want the balance of the allowance to be in the field. If the balance is to be $50 (for example) then you would enter $50 dollars. If you want to delete the balance, you will input $0.00.

  CreationDate: Enter the current or future date the allowance should be active. The user will only be able to use their allowance on or after the specified date. (Use **dd/mm/yyyy** format – i.e. **04/1/2021.**)

  ExpirationDate: Apply the date that allowance balance will no longer valid. The user will see the balance and expiration date when they log in so that they will know when their allotment will no longer be applicable. (Use **dd/mm/yyyy** format – i.e. **12/31/2021.**)

  IsActive: This column can be used to toggle the allowance account from Active to InActive if you want to turn off the allowance account in place or addition to bringing the amount to $0.00 balance. You would leave or enter T for an active account or enter F to deactivate an allowance account. (T is for True and F is for False.)

  NOTE: You must NOT make any changes to the Username or AllowanceAccountID columns.

- Delete the rows of any users that you will not be updating
- Confirm that you saved the .csv file under a unique file name
- Import the .csv file to your Allowance Management program

You can now close the pop-up to return to the ALLOWANCE MANAGEMENT page to see the changes reflected on affected users allowance accounts.

Users with active balances will now be able to apply their allowances to their purchases on or after the applicable creation date and users' inactive users or allowances with zero balances will not be able to use or see their allowance account.