Sub-User Instructions

- Setting up Sub – User
  - o To set up a Sub-User, go to User Account Setup under My Account. From here, you can add or edit Sub-Users. Click ADD NEW USER to create a Sub-User. Fill out the required fields and submit.
  - o The Sub-User will login by filling out your primary account number, their Sub-User account name, and the password associated with their Sub-User account.
  - o The Account Manager can set specific permissions for the Sub-User, which can be changed by editing the Sub-User. Note that a Sub-User must be marked as active to log in and access the site.
  - o To allow a Sub-User to access information on multiple ship-to locations, set them as a Manager and select which ship-to locations they have access to order from. All Sub-Users will be able to view the order history of every Ship-To.
  - o The Account Manager determines which Sub-User can place orders themselves and which Sub-Users must submit orders for review by the Account Manager. If you want a Sub-User to be able to submit orders independently, select Allow Submit in the ordering section. If you want a Sub-User to be required to submit their orders for review by the Account Manager, select Require Review in the ordering section.
  - o Orders submitted for review must be approved and finalized by the Account Manager. This is done under Review Users Orders in My Account. Orders submitted for review will appear in a list. Click on the order you want to review, check to make sure all the information is as desired, and then submit.
- Using Sub–User Account
  - o The Sub-User will only be able to view the account information selected by the Account Manager under Permissions.
  - o The Sub-User will share access to the Wish List and RFQ lists. Any List created by any sub-user or by the Account Manager will be accessible to all users.
  - o Carts are maintained separately. I.E. If a Sub-User adds a case of beakers to their cart, the beakers will not show up in any other Sub-User account or the Account Managers account.
  - o Sub-Users place orders the same way as the Account Manager. The only difference would be if the Sub-User is required to submit orders for review. In this case, the entire process would be the same except for the last step. Instead of a submit button, they will see a submit for review button. If the Sub-User does not need to submit for review, they will submit their order normally.
- Forgotten Sub-User Password
  - o If you forget a password to the sub-user account you have a few options:
    - ▪ You can have the Account Manager go into User Account Setup, click on edit next to the sub-user with a forgotten password, type in a new password, and hit save
    - ▪ You can also use the Forgot Password button on the login screen. For this, you will need the Account Number for the main account and the Sub-User ID. Type both of these in to the required fields and click send password to email. The

email associated with that Sub-User ID will quickly receive an email with a new password.