How to Order Online

Logging In

Our site can be found at www.offess.com. Your username is case-sensitive. See the next section regarding passwords.

Passwords

Once your account is set up to order online, you will receive a temporary password from your account manager or customer service. Upon logging in the first time you will be prompted to change it, and it must meet the criteria below.
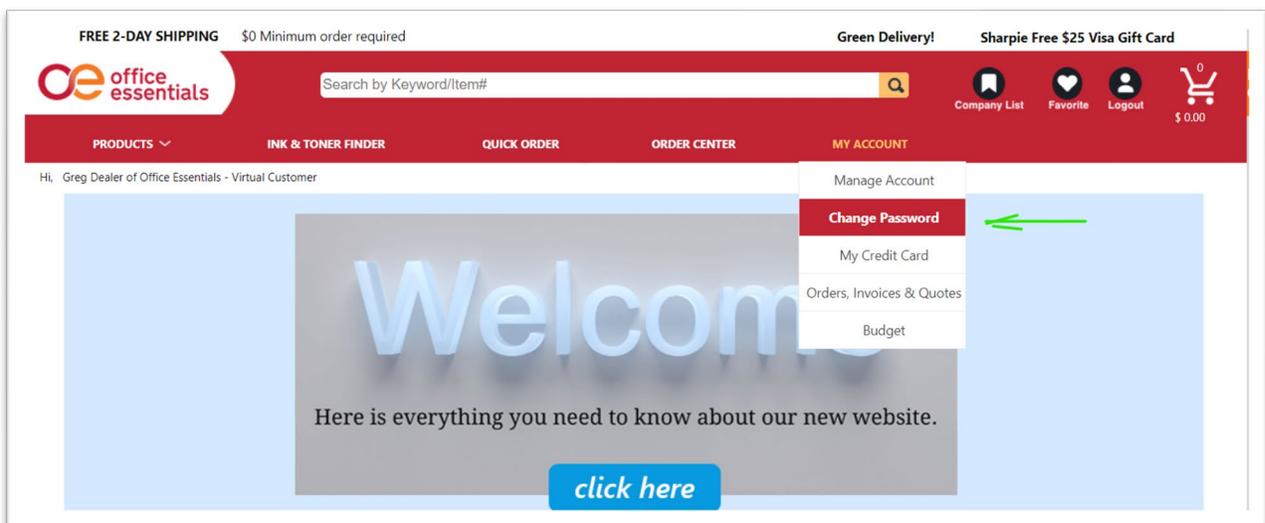
Then, every 90 days, our system will require you to reset your password.

Passwords must contain:
- At least 8 characters
- At least 1 uppercase
- At least 1 lowercase
- At least 1 number
- At least 1 special character (!@#$%^)
- Cannot be the same as any of your last 5 passwords

The system will prompt you to change your password when it is time.

You can change your password at any time here:

Please note: due to data security compliance OE has no way of knowing what your password is or was.

Favorites Lists and Company Lists

Favorites Lists allow you to save your most common items on a convenient list located in the top right corner of our site. Items can be easily added to your favorites list. See below. You can also manage multiple lists, rename lists, or delete your lists.
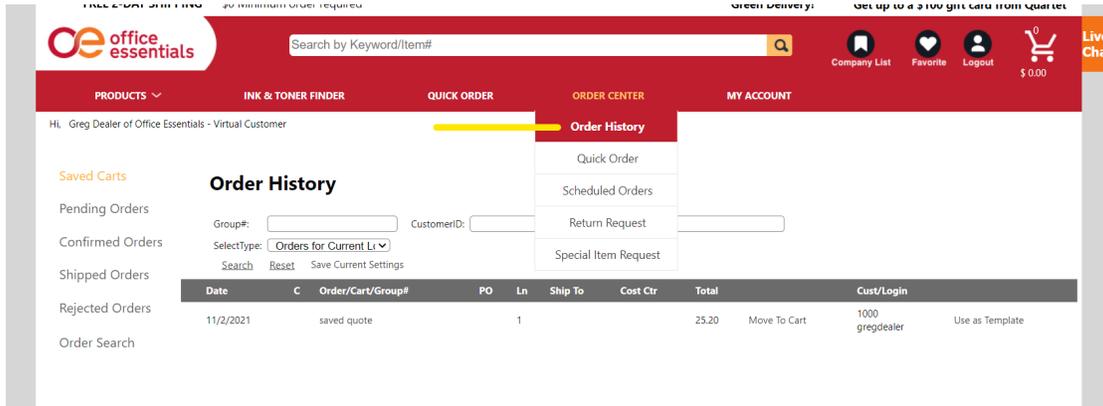
Access your Favorites List or Company Lists here.
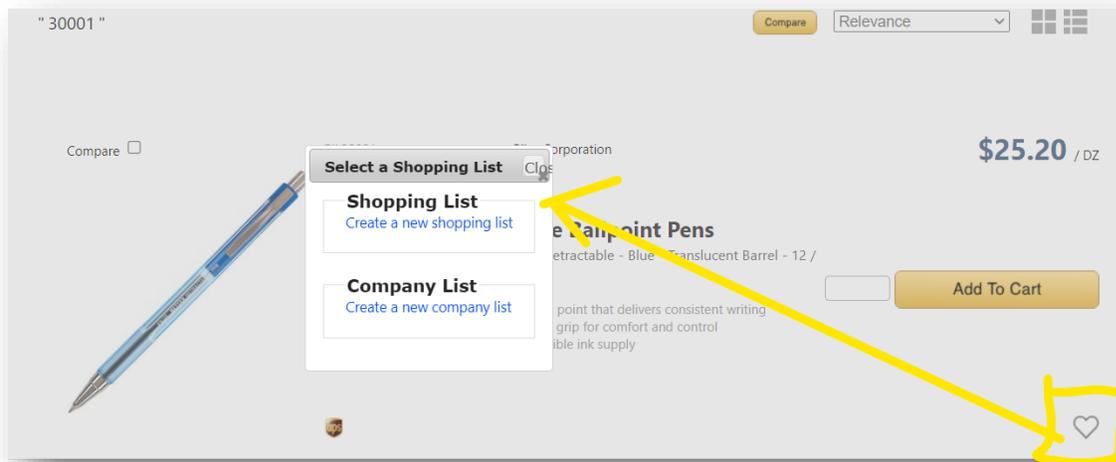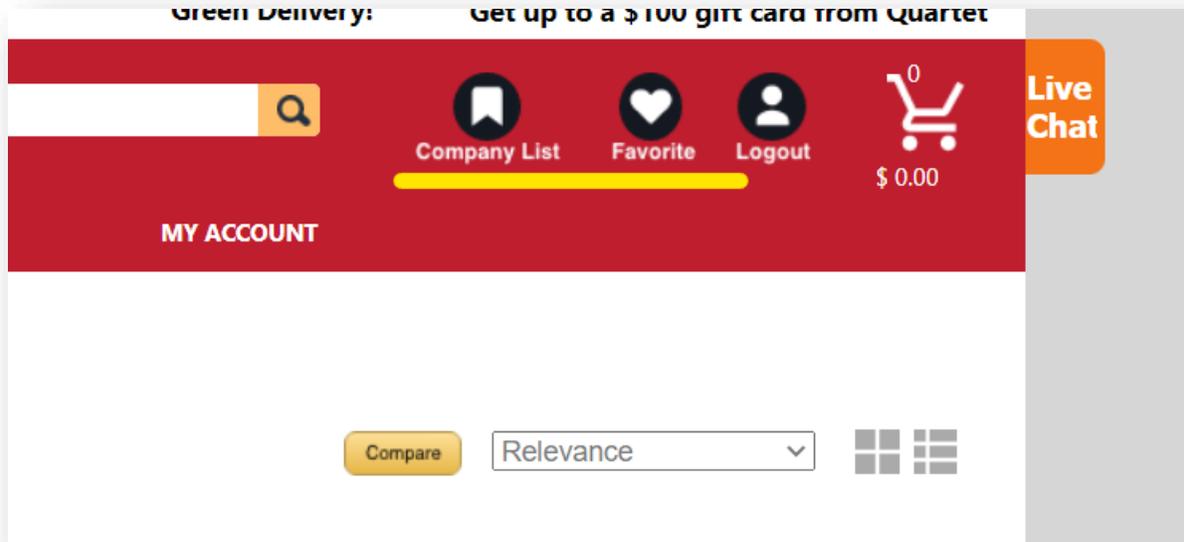
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Order History

To look up your order history, click on the "Order Center" tab as shown below, then order history. You can use the options below to drill into your orders.

# How To Place An Order

There are several ways to place an order
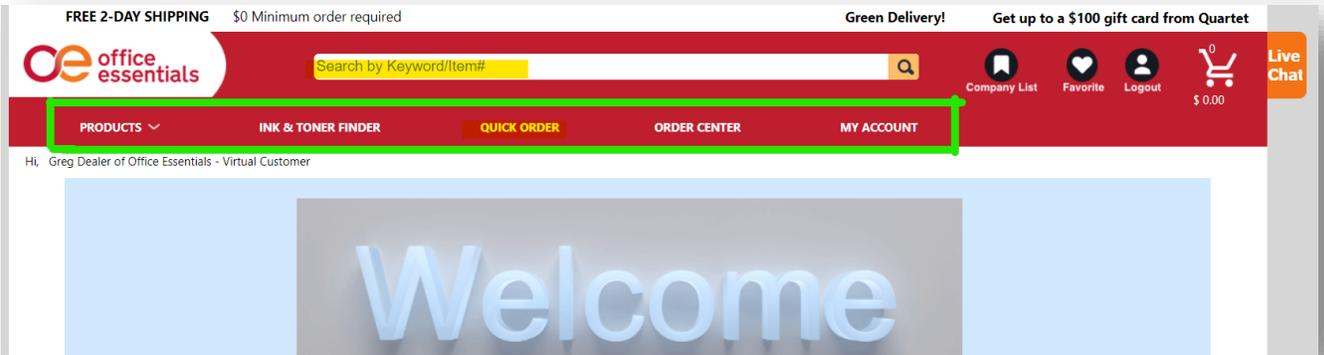
2. *Search (highlighted area)*: Type in keyword(s). Refine results by subcategory, brand, type, color, recycled content, etc. Then sort by best match, brand, price, etc. *(ex. Black Sharpie)*

3. *Browse*: By Product Category (green box) & then drill down by Sub-Category. Refine results by subcategory, brand, type, color, recycled content, etc. Then sort by best match, brand, price, etc. *(ex. Black Sharpie*

Checkout Process

Go to your cart and click checkout, then follow the prompts to complete your order.

Note a few differences from the old site:

- If you are repeatedly asked to choose a ship-to, and you want to set a default address to stop this behavior, contact customer service at 866.251.9802 or use the Live Chat feature, and we can set a default for you.
- If your company has summary billing, you have to select a Cost Center.
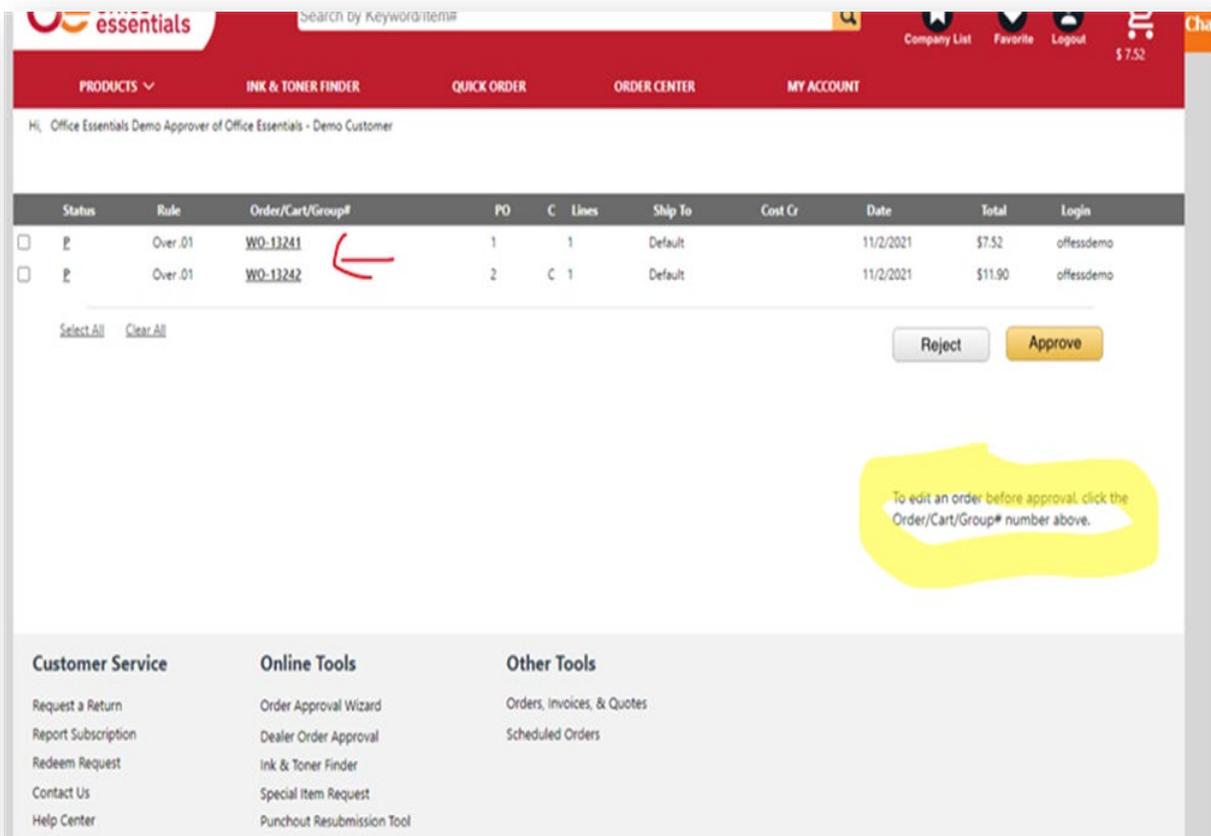- If you use a credit card, you will have to enter the 3- or 4-digit security code.
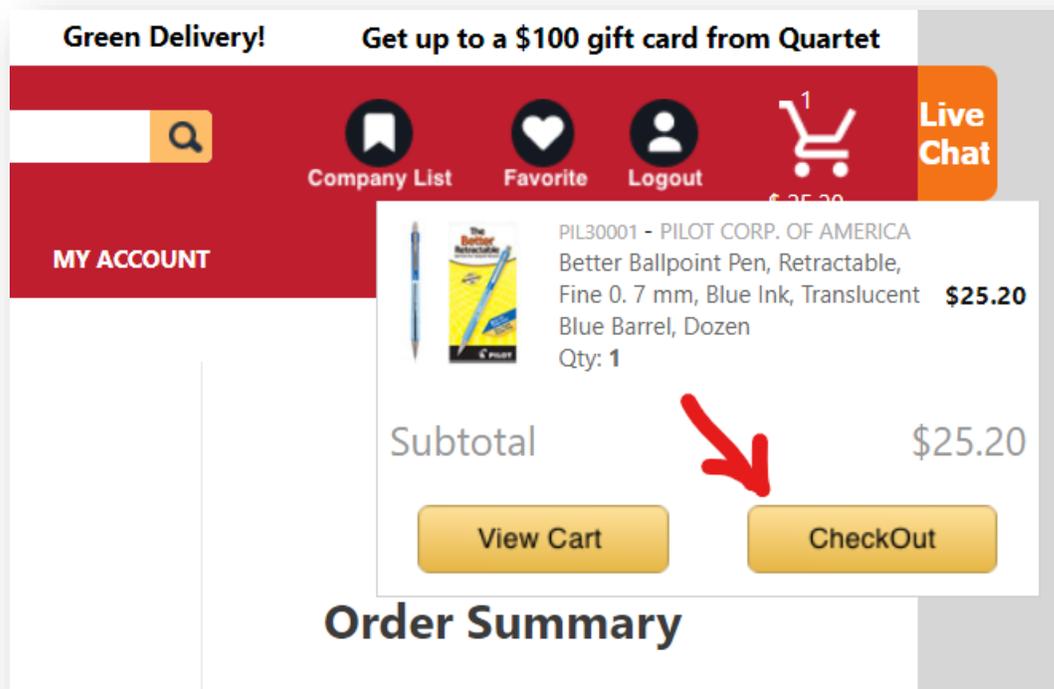
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Approvals

If your company uses an approval process, the website will send an email to your approver to review your order for approval once you check out.

If you are the approver, once you click the link from the email, you will see the following screen:

(You cannot set up your own approval process, so if this is something you want, please contact your account manager.)

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View Order Status

- Go to Order Center
- Select Order History
- Select Type: Orders for all Logins (Since you have multiple users, this field must be selected to view all orders)
- Select "Saved Carts" – This will show any open order that is awaiting approval or has been saved by one of your end-users
- Select "Confirmed Orders" – This will show an order that has been placed and OE has confirmed receipt of the order
- Select "Shipped Orders" – This will show all shipped orders, as well as the tracking information
- Select "Order Search" – This will show all orders placed on your account
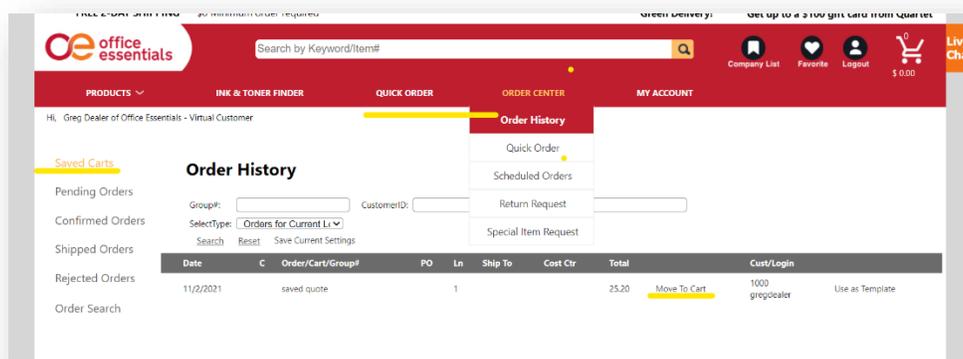
Additional "How to" Information

Saved Orders

Saved orders allow you to build orders over time and then submit them when you're ready.

To save an order, view your cart, and then click the Save Cart link and give your saved cart a name, as shown below.
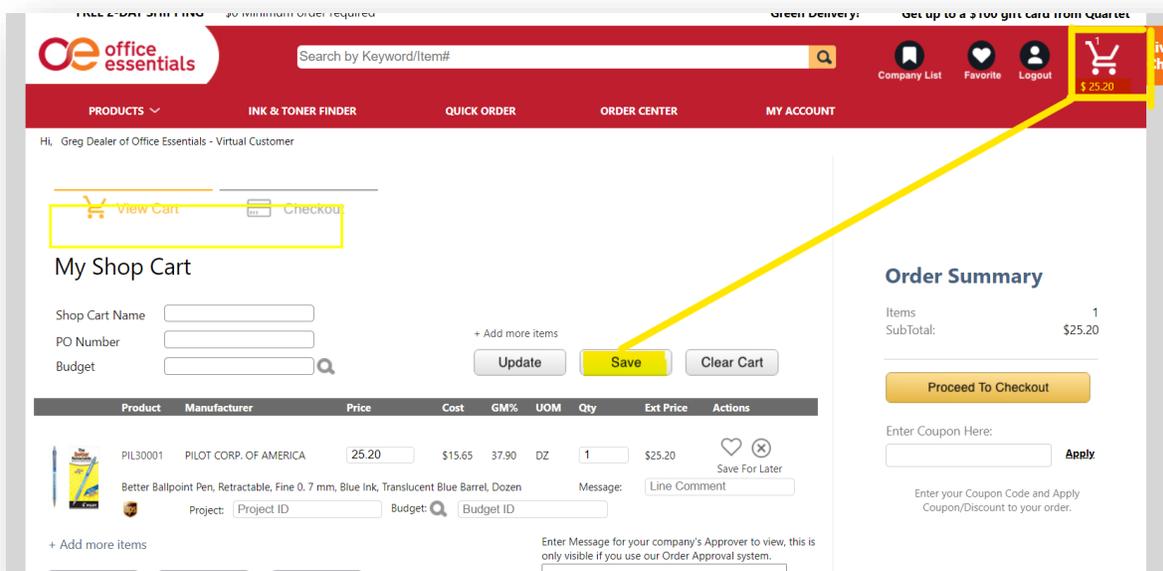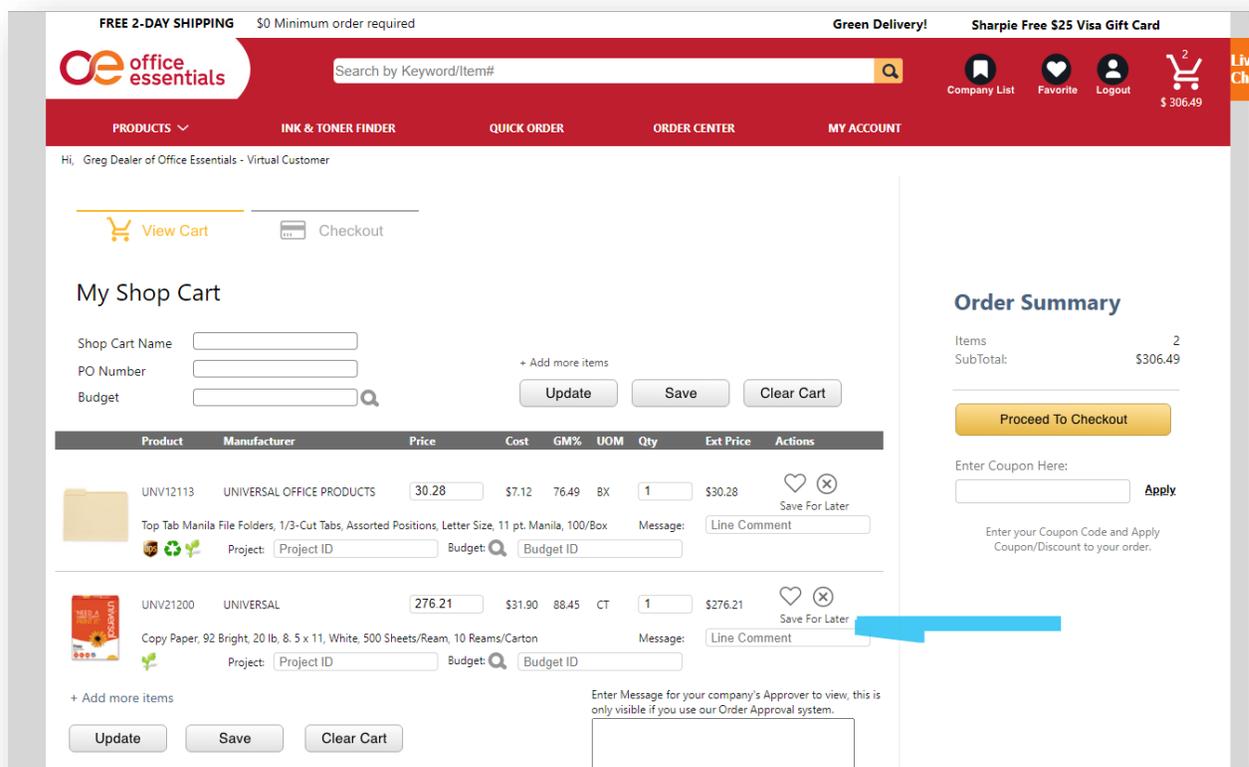

To retrieve a Saved Order, go to Order Center > Order History > then Saved Carts. When the order comes up, select Move to Cart.

Save for Later

Not to be confused with Saved Carts, Save for Later is a per-item feature within the Shopping Cart to use if you have an item in your cart you are not ready to purchase yet, but might later. In this case, you can click Save for Later to remove the item from your order, but not from your cart.

Product	Manufacturer	Price	Cost	GM%	UOM	Qty	Ext Price	Actions
UNV12113	UNIVERSAL OFFICE PRODUCTS	30.28	$7.12	76.49	BX	1	$30.28	♡ ⊗ Save For Later

Top Tab Manila File Folders, 1/3-Cut Tabs, Assorted Positions, Letter Size, 11 pt. Manila, 100/Box

Message: Line Comment

Project: Project ID   Budget: 🔍 Budget ID

+ Add more items

[Update]   [Save]   [Clear Cart]

Enter Message for your company's Approver to view, this is only visible if you use our Order Approval system.

Saved For Later Items

Product	Description	Unit	Price	Qty	Ext. Price	Budget
UNV21200	Copy Paper, 92 Bright, 20 lb, 8. 5 x 11, White, 500 Sheets/Ream, 10 Reams/Carton	CT	276.21	1	276.21	🔍 🛒 ⊗

Message:

[Update]   [Clear Cart]

[Proceed To Checkout]

Enter Coupon Here:

[   ] **Apply**

Enter your Coupon Code and Apply
Coupon/Discount to your order.

Scheduled Orders

If you would like to schedule an order to be automatically placed on a regular interval of your choosing, follow these steps.

Add the items that will be on your scheduled order to your cart and click proceed to checkout. (It won't place your order yet.)

At the bottom of the next screen is a Schedule Order button.

Clicking that will give you the following options to set your frequency. Please note: days of the week are represented by numbers. Monday is 1, Tuesday is 2, etc.

You can also decide if you want to be alerted by email to place the order, or have it automatically process itself with no intervention:
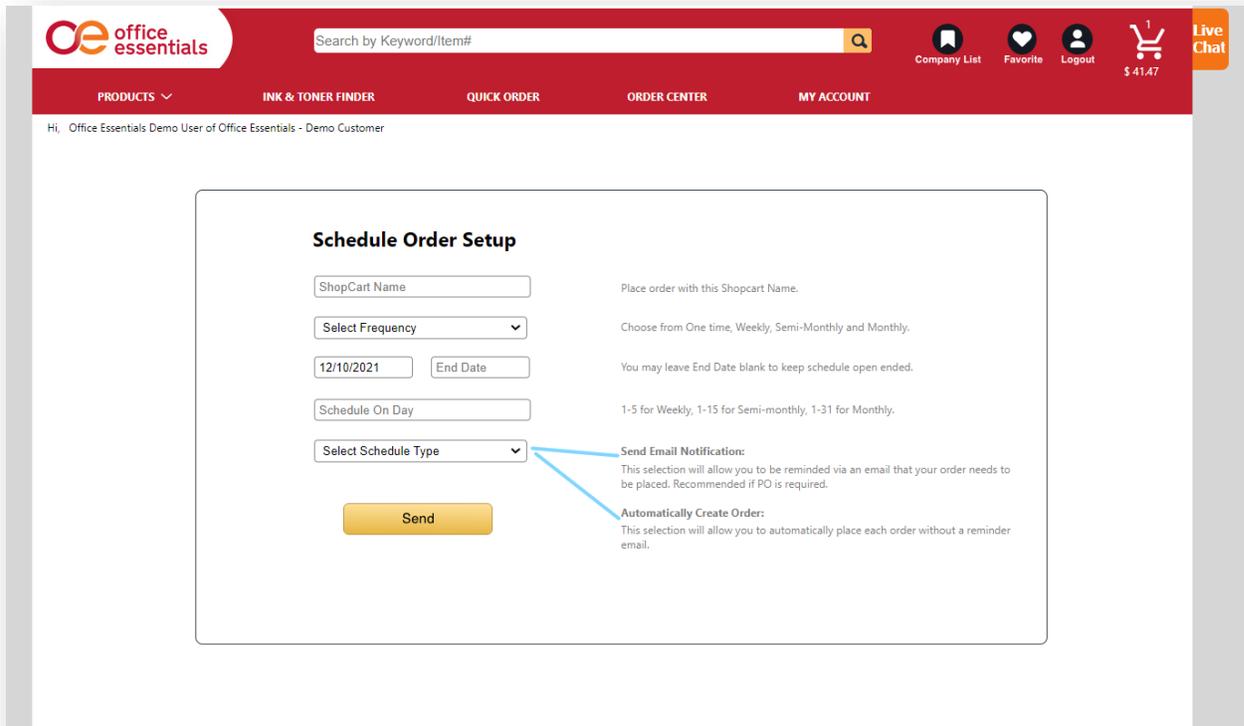
At the moment, there is not an intuitive way to pause the schedule if need be. A workaround is to change the end date prior to the current date so it will never execute. Until you change the end date back to what it was originally.

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Soft Subs

When placing an order, soft sub logic offers a less expensive alternative when the entered item is designated as a soft sub. Soft subs are suggestions. If you want to keep the original item, click confirm. If you're going to use the suggested alternative, click the radio button on the suggested sub and click confirm. If you see the thumbs-up icon below an item, a soft sub exists on an item.

Hard Subs

OE will never substitute a product without your permission. But when you need us to, we can. Furthermore, we will come to you with proactive considerations. For example, if we work together to convert a handful of meaningful products to greener alternatives, you may decide you always want these products used in lieu of another. In this case, we can incorporate an approved hard product sub.

UNV21200 is added to the cart here, but the user's company has automatically asked us to substitute UNV91200. This happens automatically with no action needed on the part of the orderer.

Contract Indicators

The red icon with a dollar sign below denotes when an item is on one of your contracts.

Restricted List

On our old site, if your company by policy has items they do now want you to purchase from Office Essentials, and you tried to order one of these items, the system would tell you that you are restricted from buying it. On the new site, it says "restricted by company policy".
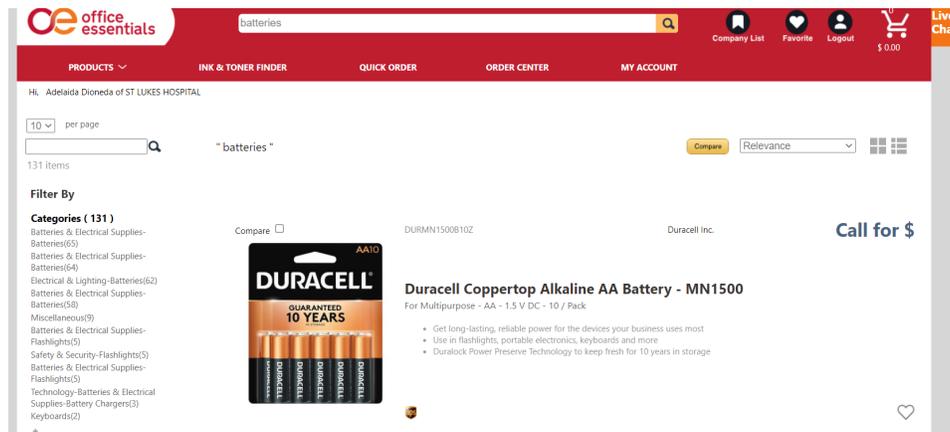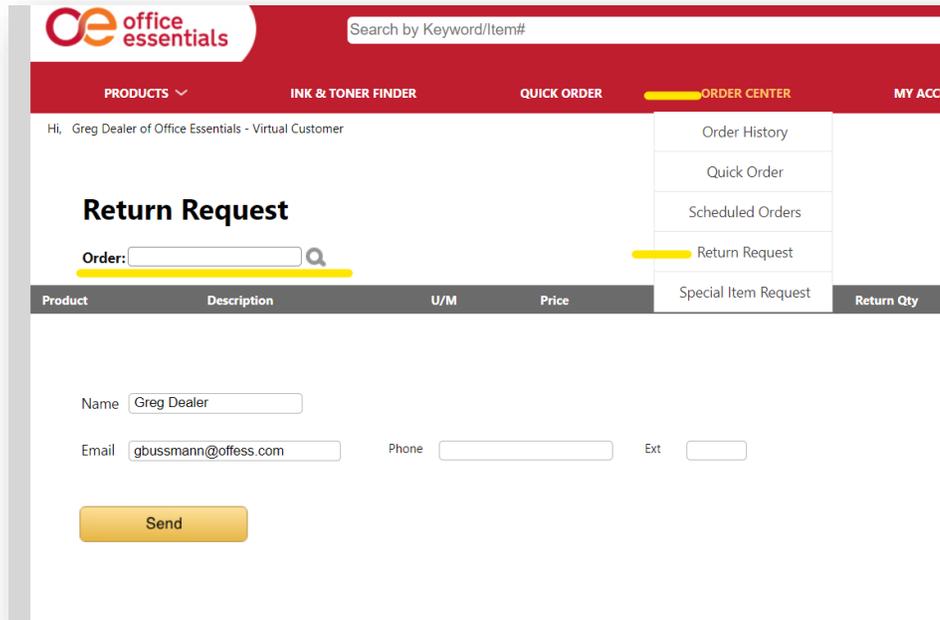
Request a Return

To request a return, go to Order Center > Request Return and enter your order number or use the magnifying glass icon to search for it. Then fill in your contact information and send it over.

Live Chat Button

If you still have questions, please utilize our live chat feature to get right to our Customer Care team, email them at customerservice@offess.com, or call us at 866.251.9802.