



Staples.ca Preferred Migration Onboarding Guide

Exciting news! We're moving from staplespreferred.ca to staples.ca, giving members an even better online shopping experience as a valued business customer. Your Preferred business pricing, benefits, perks, and account info have been transferred to the new site.



This guide provides a detailed overview of how to best manage the new Staples Preferred website. Through step-by-step illustrations, members will be able to experience a seamless transition to Staples.ca.

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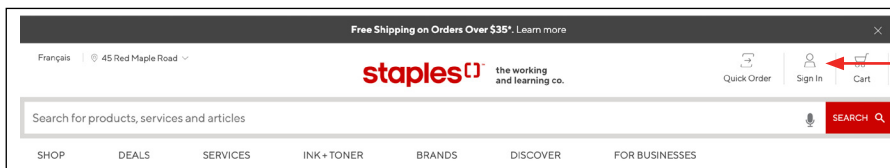
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Create an Account

When the user visits staples.ca, we encourage the user to sign into their account immediately to access their Preferred business pricing, benefits, and perks.

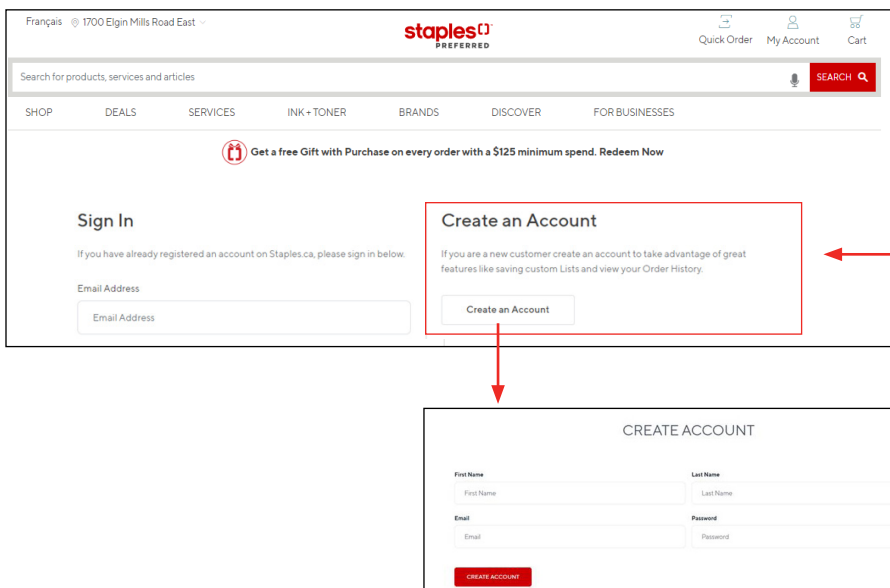
Step 1 Go to staples.ca to access Staple Preferred online.

Step 2 Sign in button on staples.ca



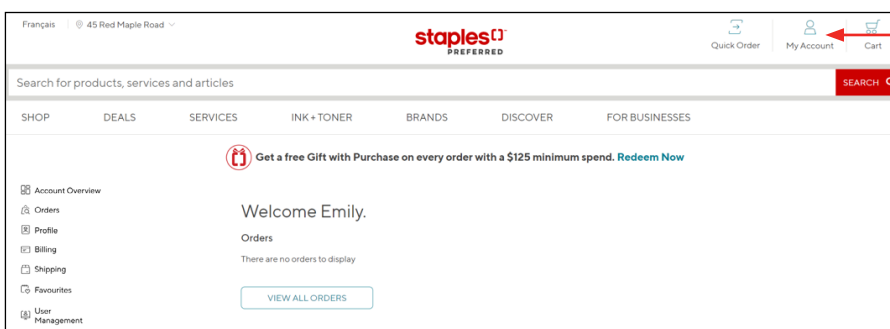
Click-on **Sign in** button.

Step 3 Staples Preferred **Create an Account** page.



Create an Account.

Step 4 Once logged in the user will be directed to Account Overview page.



My Account

For more information, contact our Customer Service line at 1.877.907.0548 or visit the Preferred Help Centre.

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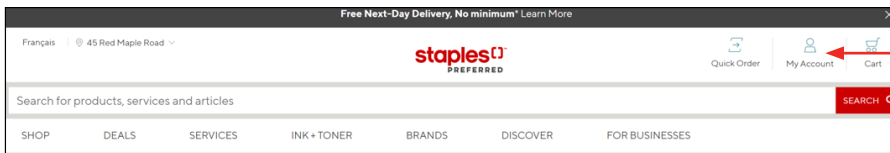
Customer Profile Page

Update Personal Details

The Profile page in the Account Overview section contains vital member information.

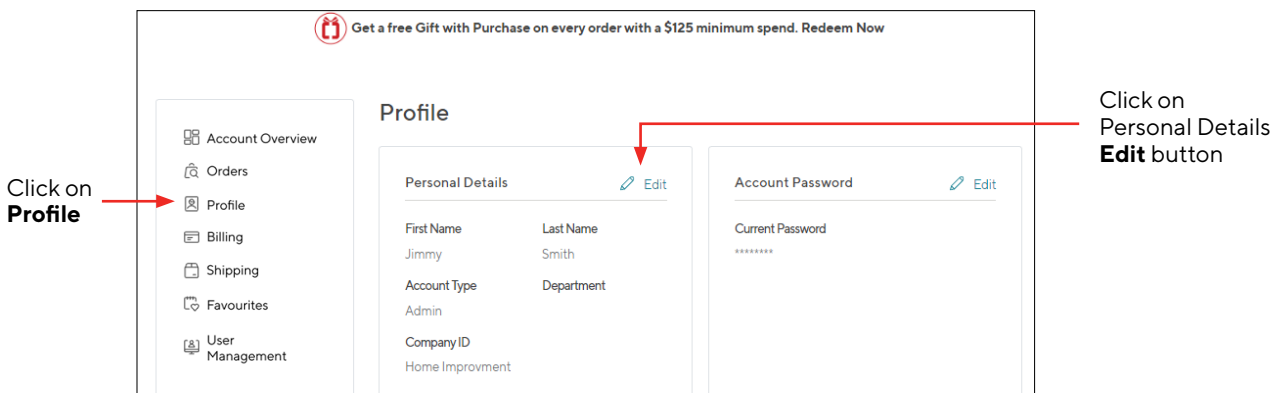
Step 1 Visit staples.ca and log in to your Staples Preferred account.

Step 2 Click on **My Account**.

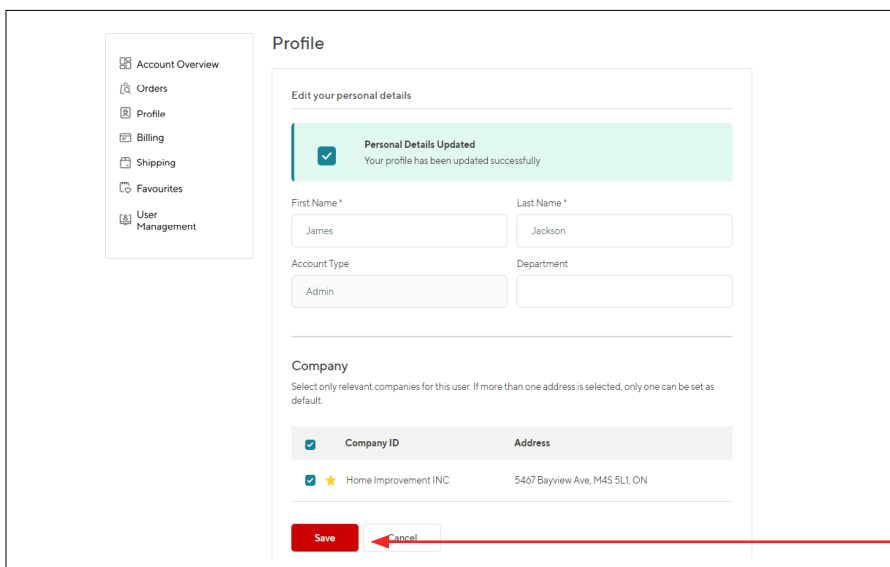


My Account

Step 3 Click on **Profile** and click on Personal Details **Edit** button.



Step 4 Update Personal Details as required and click **Save**.



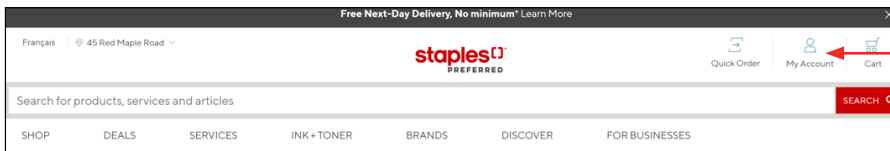
For more information, contact our Customer Service line at 1.877.907.0548 or visit the Preferred Help Centre.

Change Password

The user can update their password at any time using the following steps:

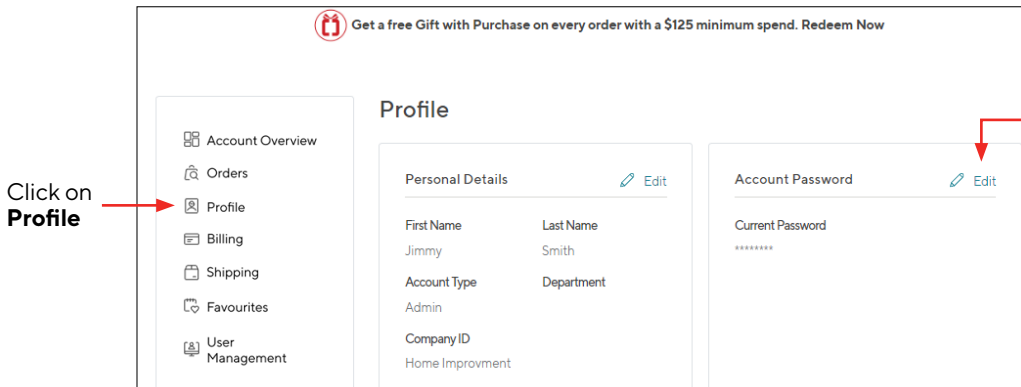
Step 1 Visit staples.ca and log in to your Staples Preferred account.

Step 2 Click on **My Account**.

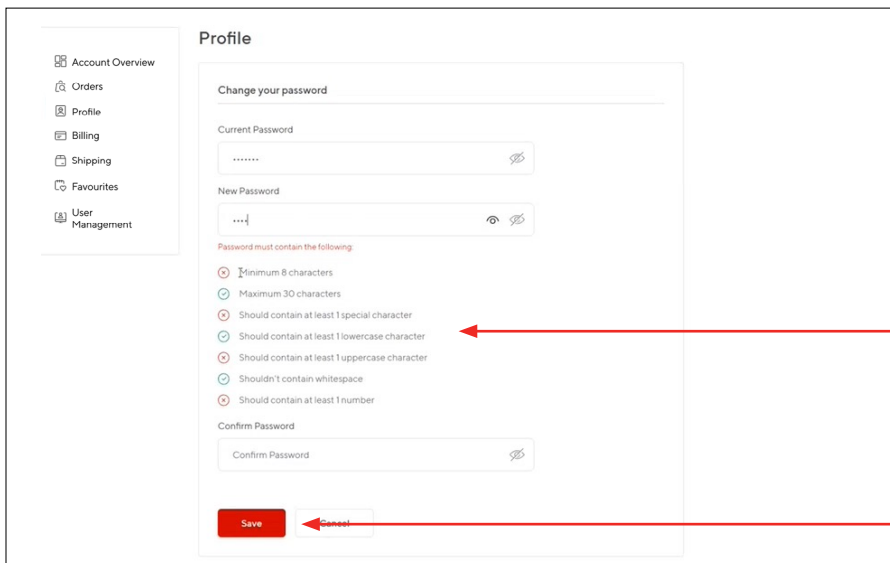


My Account

Step 3 Click on **Profile** and click on Account Password **Edit** button.



Step 4 Enter new Password. Site will list password criteria and will dynamically validate password to ensure it meets required criteria. Password criteria will disappear once password is validated. Click on **Save**.



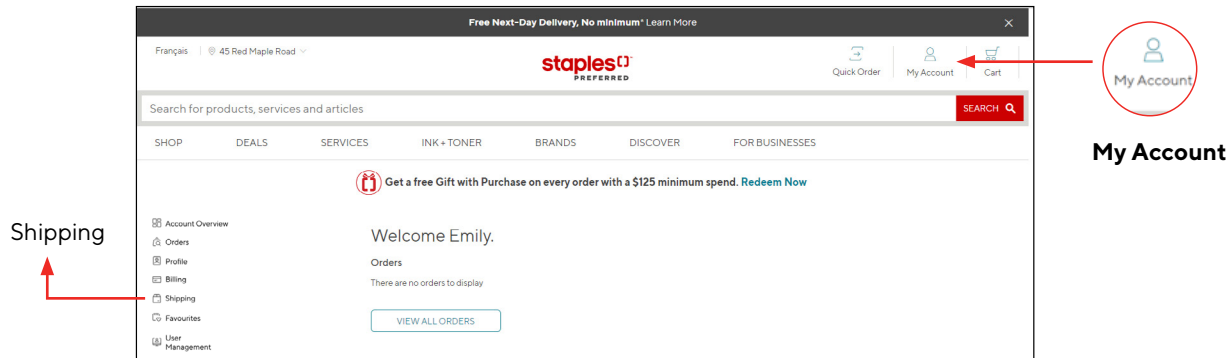
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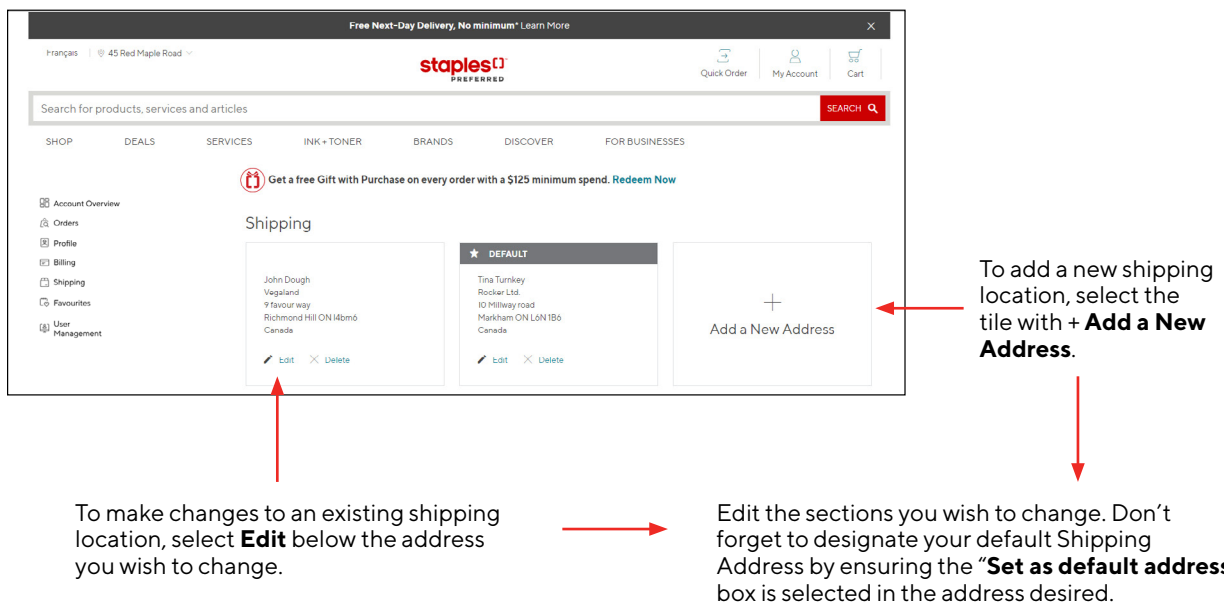
Adding Multiple Shipping Locations

Add multiple shipping locations so you can easily and quickly send supplies to multiple office locations, remote employees, or temporary spaces.

Step 1 Once logged-in to your account, click on **My Account** to navigate to the Account Overview page.



Step 2 Once selected, you will be taken to the Shipping page where you will see an overview of your current Shipping locations. These will include an individual's name, address, and postal code. Additionally, you will see which shipping location is selected as the Default location.

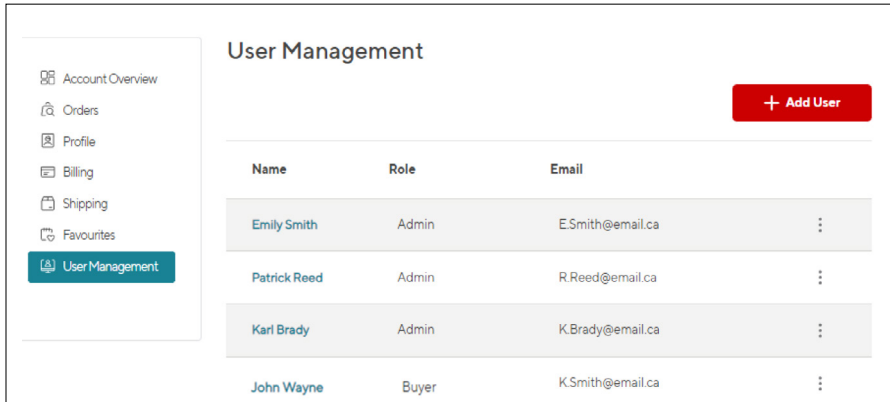


User Management

User Roles

Members can assign their users 2 role types:

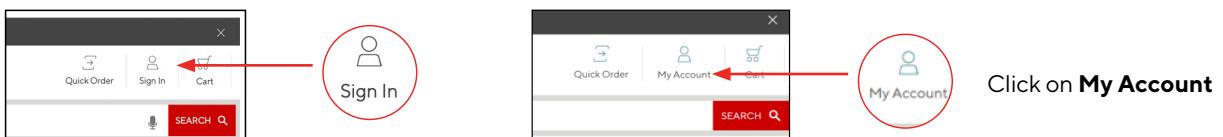
- **Admin:** Users with this role can view users in the organization, Add/Edit/Delete users, see all company orders and place orders. Admin roles have access to the User Management menu.
- **Buyer:** Users with this role can see and place orders. Buyer roles do not have access to the User Management menu.



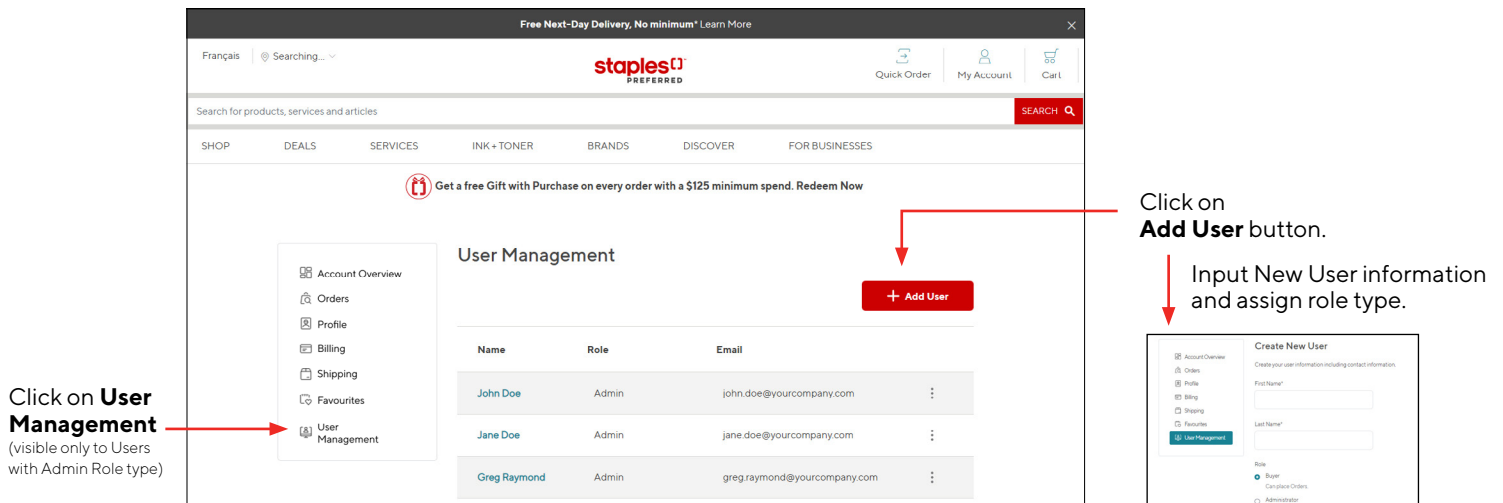
Adding an Account

Only Users with an Admin Role can add users.

Step 1 Visit staples.ca and log in to your Staples Preferred account.



Step 2 Click on User Management in the My Account page



For more information, contact our Customer Service line at 1.877.907.0548 or visit the Preferred Help Centre.

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Step 3

The user may have multiple companies to choose from. Select appropriate Company connected to new user (for billing purposes). Note: Company is inputted manually by Staples to the customer business account. It cannot be added online.

Click on **Create** button once completed creation of new user. The new user will receive an email from Staples with an invite to login to the Staples Preferred site as requested by their colleague.

Editing Users

Only Users with Admin roles can edit User information. It can be edited by clicking on the right side of the username. Select required task.

Click on **User Management**
(visible only to Users with Admin Role type)

Name	Role	Email
John Doe	Admin	john.doe@yourcompany.com
Jane Doe	Admin	jane.doe@yourcompany.com
Greg Raymond	Admin	greg.raymond@yourcompany.com

Select **Edit User**. Admin users can edit the user info. Click on **Save** to accept changes

Deleting Users

Only Users with an Admin Role can delete Users. Users can be deleted by clicking on the right side of the username. Select required task.

Click on **User Management**
(visible only to Users with Admin Role type)

The screenshot shows the Staples Preferred User Management interface. On the left, a sidebar contains links for Account Overview, Orders, Profile, Billing, Shipping, Favourites, and User Management. The 'User Management' link is highlighted with a red arrow and labeled 'Click on User Management (visible only to Users with Admin Role type)'. The main content area is titled 'User Management' and features a '+ Add User' button. Below this is a table with columns for Name, Role, and Email. The table lists three users: John Doe (Admin, john.doe@yourcompany.com), Jane Doe (Admin, jane.doe@yourcompany.com), and Greg Raymond (Admin, greg.raymond@yourcompany.com). A red circle highlights the three-dot menu icon on the right side of the John Doe row, with a red arrow pointing to it from the text 'Select Delete User...' below.

Select **Delete User**. Users can be deleted by hovering over the user and moving the cursor to the right side of the username and clicking on Delete.

User will see message below to confirm User Deletion.

Delete Selected User

Are you sure you want to delete the selected user?
Selected user will lose all access to Preferred and their data will be deleted.

Delete **Cancel**

Order Page

How to Place an Order

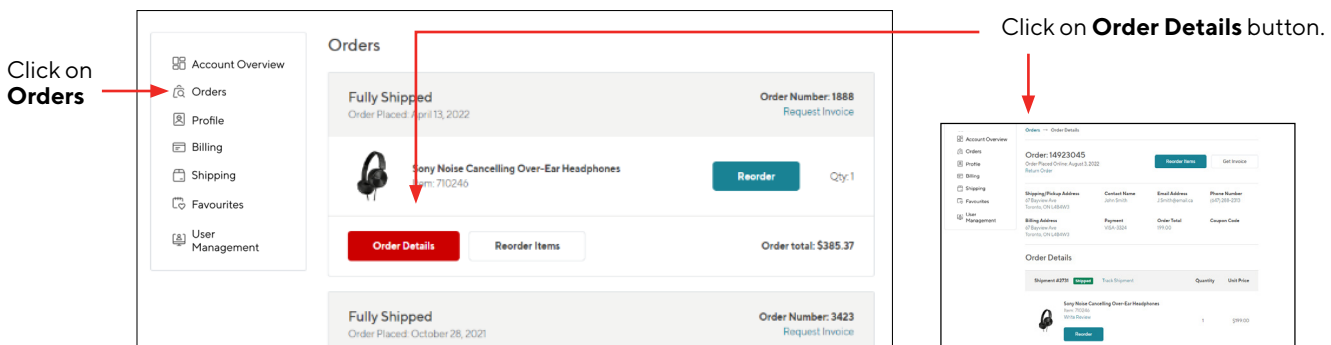
When you login to your Staples account as a Preferred Member you will see the Staples Preferred logo at the top confirming your status.

Using the menu and navigation at the top of the page you can:

- **Search:** type in the search bar or use voice the activated search (microphone icon) to find what you need
- **Shop:** by product categories
- **Discover:** tools, resources, and products to work, learn and grow using guides like Small Business Headquarters, Clean, Safe & Well, Work From Anywhere.
- **Deals:** explore hot buys and limited time offers in our Bulk Buy Centre, Deals Centre, and Clearance Centre, or find exclusive offers in our Coupon Centre.

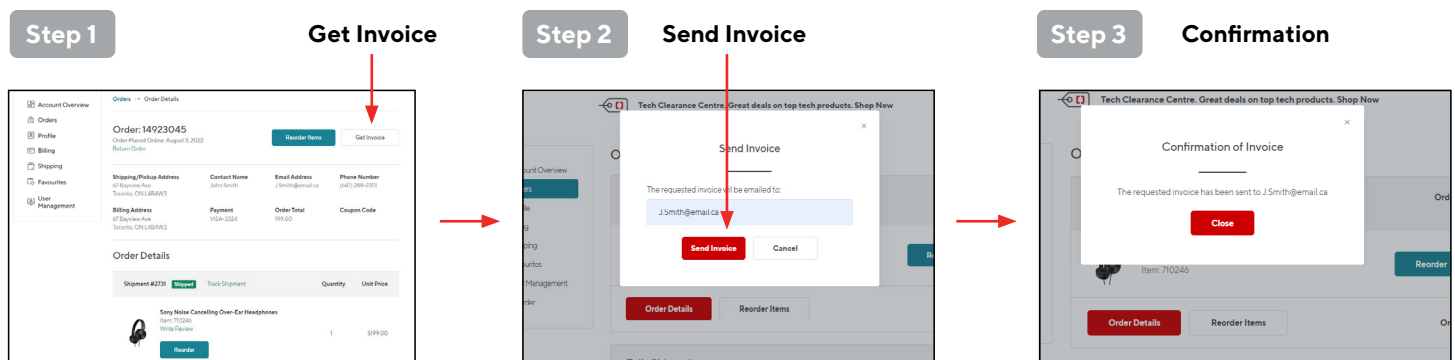
View Previous Order / View Order Details

Select **Orders** from the options on the left-hand side of the Account Overview page.



Request Invoice

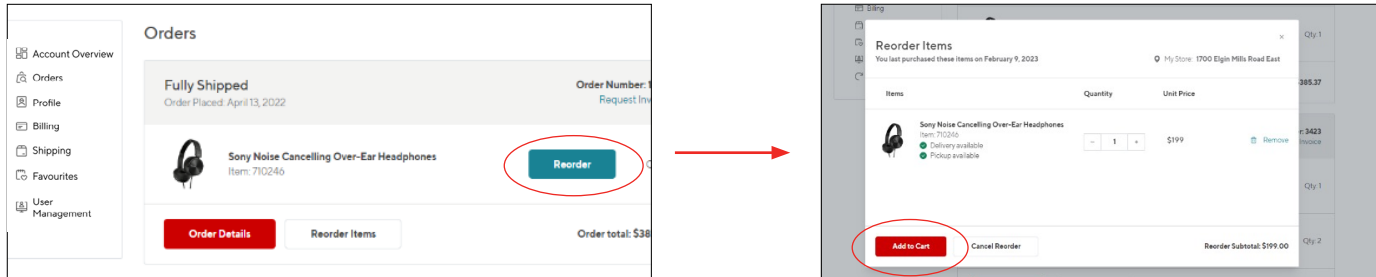
A copy of the invoice can be requested by going to the Order and click on **Get Invoice** button. Enter email address for invoice and click **Send Invoice** button. You will receive a confirmation message



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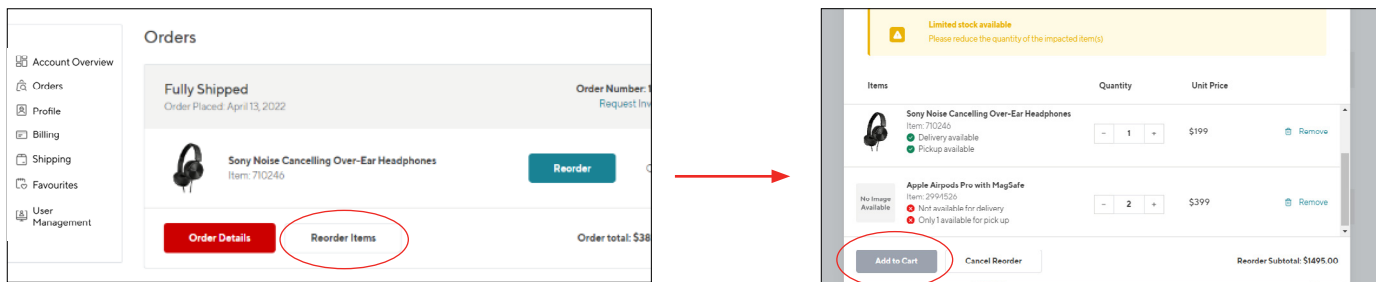
Reorder Item

Click on **Reorder** button beside desired product.



Reorder Shipment

Click on **Reorder** button on the bottom of the Order.

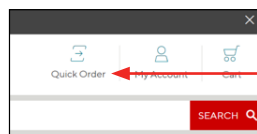


Items will be checked for inventory status at this point. Out of stock items will be flagged and will not be added to cart until the quantity is adjusted to within inventory levels or item is removed.

Add Products with Quick Order

Step 1

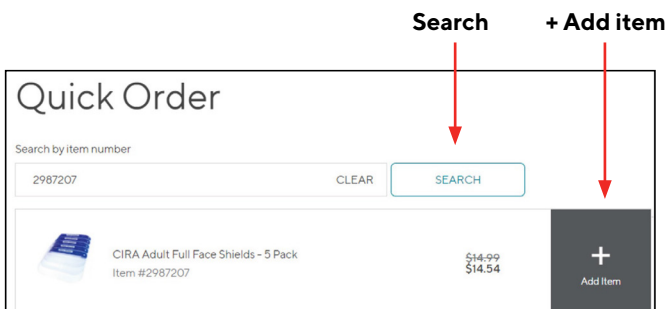
Once logged in to your account, click on the My Account icon to navigate to your My Account Overview page. Click on **Quick Order**.



Click on **Quick Order**.

Step 2

You will be prompted to search the item number you are looking for. Once entered, select **Search**. Once the result for the item number loads, you will also see your Preferred pricing below the crossed-out regular retail pricing.



- Add your item to Cart and proceed to checkout if that's the only purchase you wish to make.
- If you would like to search and add multiple products, **Search** by item numbers, and continue to select **+ Add Item**. Once complete, you can select the **Add All and View Cart** at the bottom of the list.

ADD ALL AND VIEW CART

- A popup will confirm that the items have been added to Cart. You can choose to **Continue Shopping** or **View Cart** and proceed to checkout.

Continue Shopping

VIEW CART

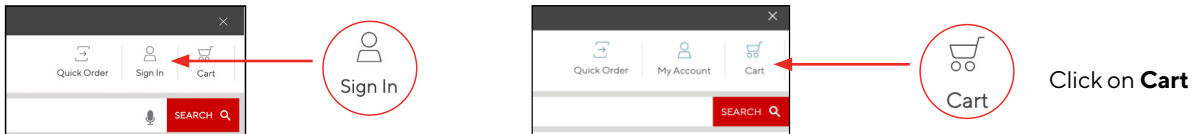
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Checkout/Billing

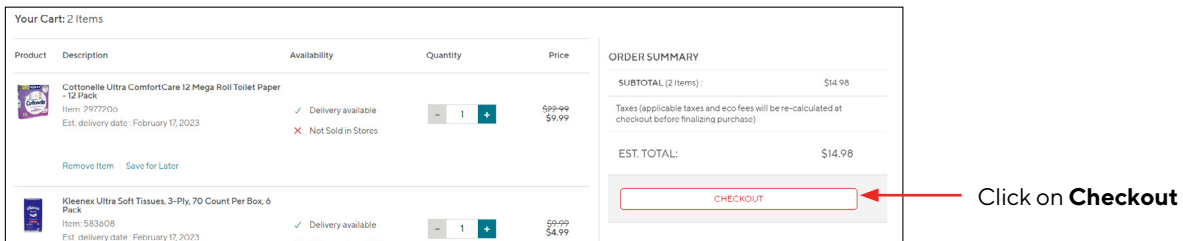
Checkout

Once the user has completed shopping and ready to check out, follow these simple steps to complete their shopping experience on [staples.ca](https://www.staples.ca).

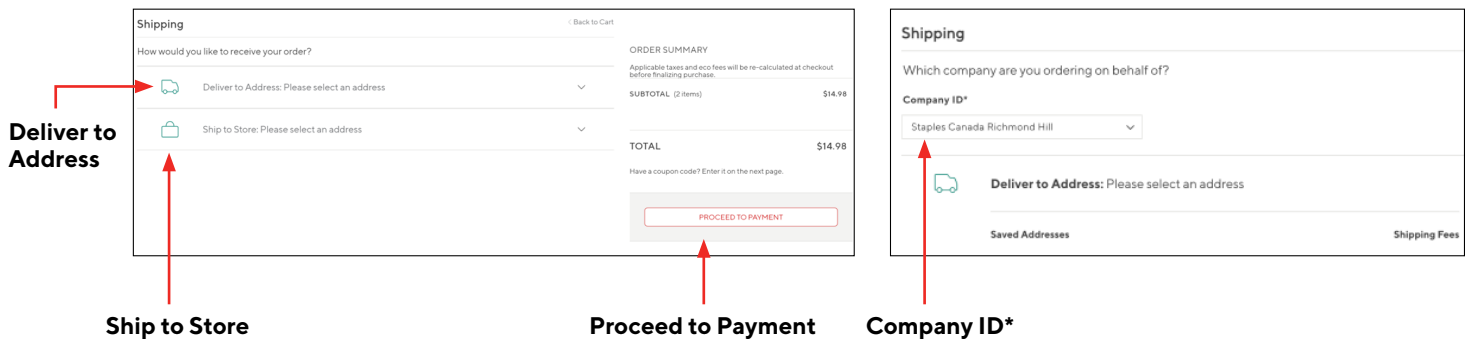
Step 1 Log in to your Staples Preferred Account. Click on the **Cart** icon to navigate to your Shopping cart page.



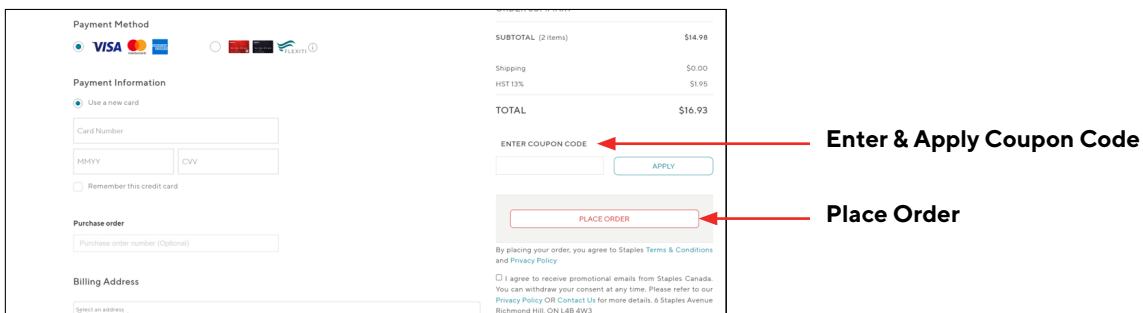
Step 2 Review Cart items. Once satisfied with your shopping cart, click on **Checkout**.



Step 3 Enter Shipping information. Select **Deliver to Address** or **Ship to Store** (for pick-up). **Proceed to Payment** once shipping info is filled in. User can select Company (if user has setup multiple companies in their profile) from the **Company ID*** drop down menu.



Step 4 Enter Payment information. **Enter & Apply Coupon Code** if applicable. Click on **Place Order** once payment and coupon information are filled in. You will receive an email confirmation for your order.



For more information, contact our Customer Service line at 1.877.907.0548 or visit the Preferred Help Centre.

Billing Stored Credit Cards

Step 1

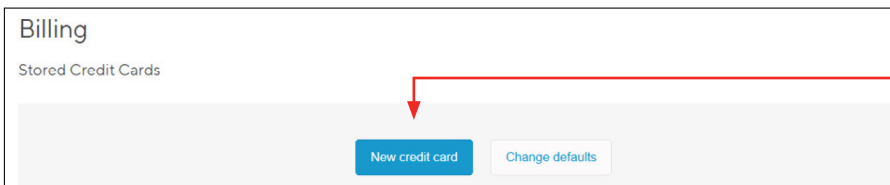
Once logged in to your account, you will automatically be directed to your My Account Overview page. At the left-hand side of the Overview page, you will see a set of options, including **Billing**. Select this option.

Billing



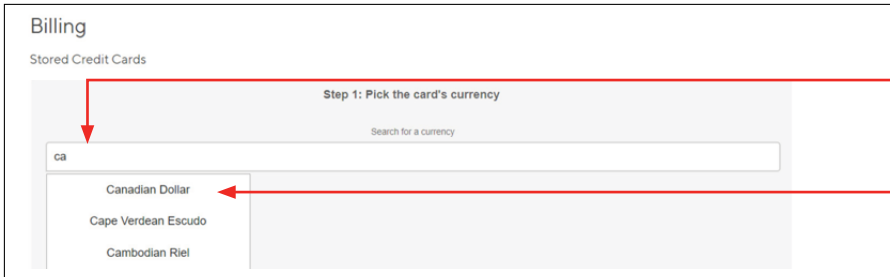
Step 2

Once selected, you will be taken to the Billing page where you can store additional credit cards for your profile. To add a new credit card select **"New Credit Card"**



Step 3

In the search field, type the currency in which your new card will be under. In the example below, we will type "CAD" for Canadian currency. **Canadian Dollar** will come up in the search field.



Step 5

Fill out your credit card details and credit card billing info. Ensure that all information is correct before proceeding. You have the option to select this as **your default credit card** to use for payment by checking the box.

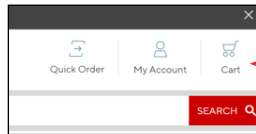
Lastly, press **Save Card** to add this new card to your stored credit cards. You can repeat the process to add other credit cards to your profile. You also have the ability to change your default method of payment.

Perks & Gift with Purchase

How to add a Coupon to Your Shopping Cart

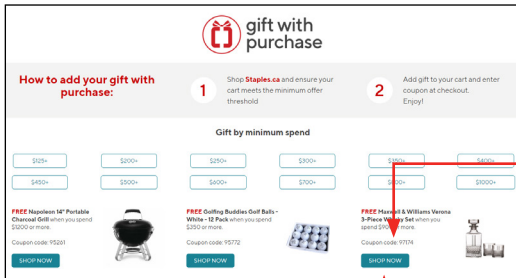
Once the member has completed their shopping, and they are ready to check out, they can follow these simple steps to complete their shopping experience on [staples.ca](https://www.staples.ca).

Step 1 View your shopping cart and proceed to payment once you've completed your shopping. After you've added an item you will be prompted with a pop up that shows your item has been added and to View Cart, or you can select the shopping cart icon in the top right hand corner to view.



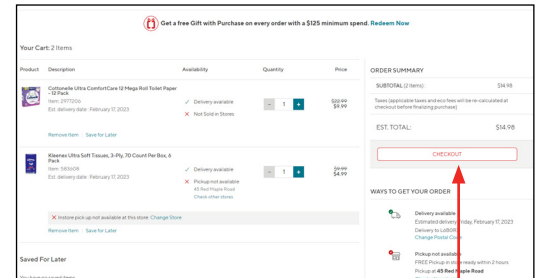
Click on **Cart**

Step 2 Have your coupon code on hand. You can also use coupons from email, traditional mail, or our Gift with Purchase Centre for your purchase. In the Gift with Purchase Centre, select the **Coupon Code** number to copy the code or select **Shop Now**.



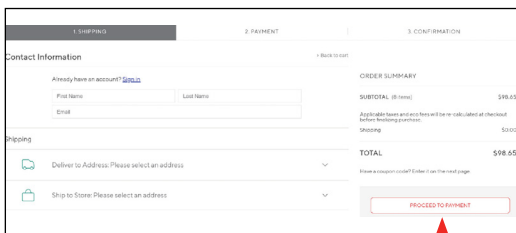
Select the
Coupon Code

Or select
Shop Now



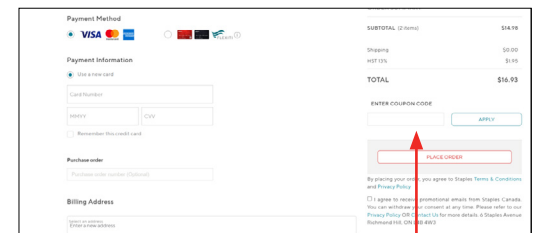
Once you've reviewed all your items, select **Checkout** to proceed.

Step 3 Next is the shipping confirmation page where you will select your desired shipping or pickup method and enter your contact information. Select **Proceed to Payment**.



Proceed to Payment

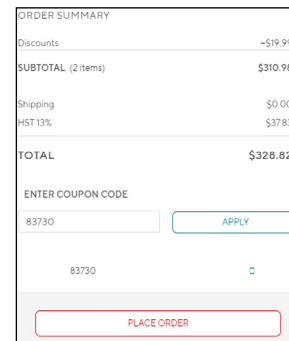
Step 4 Type in or paste your **Coupon Code** in the field on the right-hand side of the page and select **Apply**.



Enter & Apply Coupon Code

Step 5 You will immediately see the **Discounts** that have been applied. In the example, -\$19.99 was taken off the order. After you select that you **Agree** with the terms and conditions, select **Place Order**. You will receive an order confirmation indicating that your order is being processed.

If you've selected **Contactless Curbside Store Pickup**, wait for an email confirmation that your order is ready for curbside pickup. Upon arrival, have your ID and confirmation ready. Call the store and an associate will bring out your order.



Discounts

Place Order

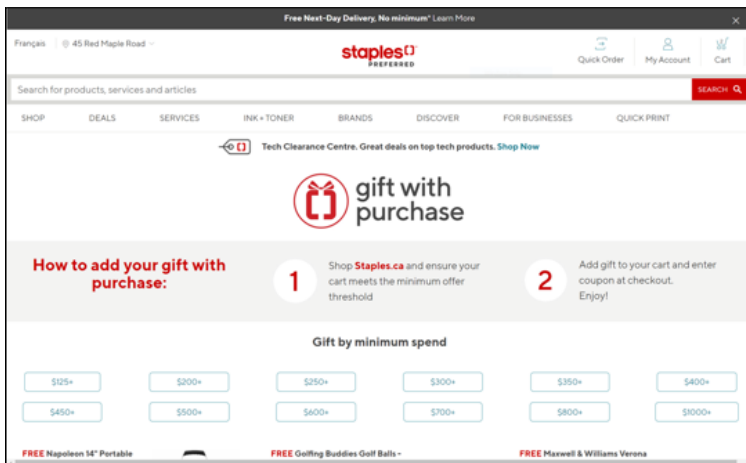
For more information, contact our Customer Service line at 1.877.907.0548 or visit the Preferred Help Centre.

How to select Gift with Purchase

Members that meet a spend threshold are eligible for a Gift with Purchase. Users can view available Gift with Purchase items by visiting the Gift with Purchase Page or viewing the Gift with Purchase carousel at Checkout.

Gift with Purchase Page

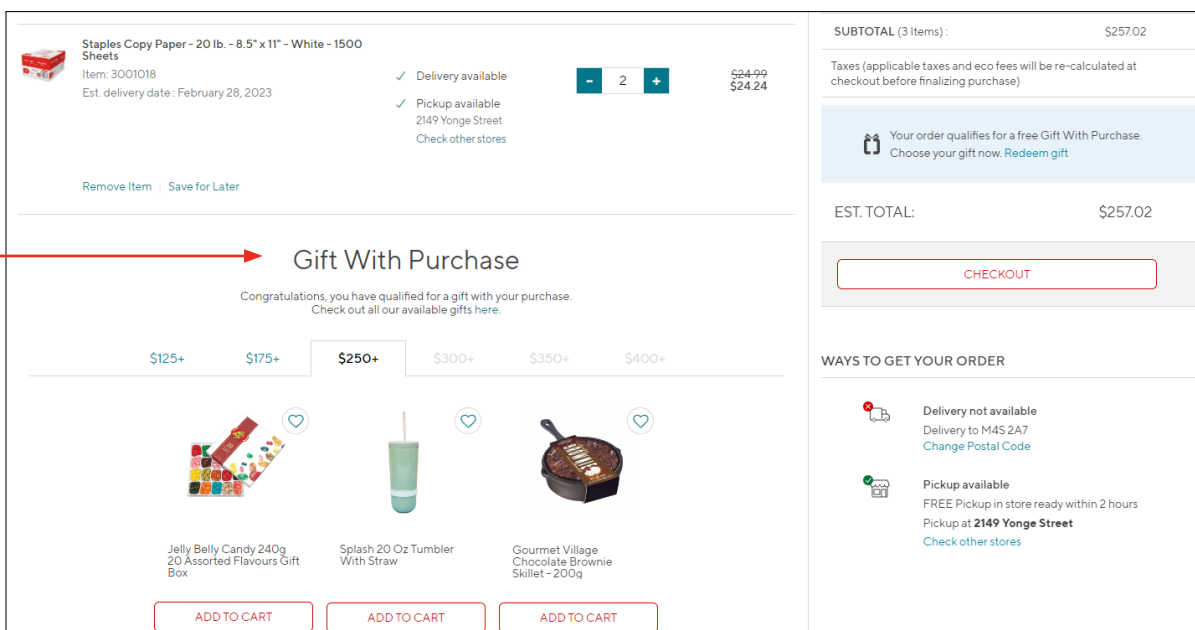
Visit Gift with Purchase page at [Special Gift with Purchase | Staples.ca](https://www.staples.ca/Special-Gift-with-Purchase).



Gift with Purchase Carousel

The Gift with Purchase Carousel will display products that qualify based on your spend threshold at the Checkout screen.

Gift with
Purchase
Carousel

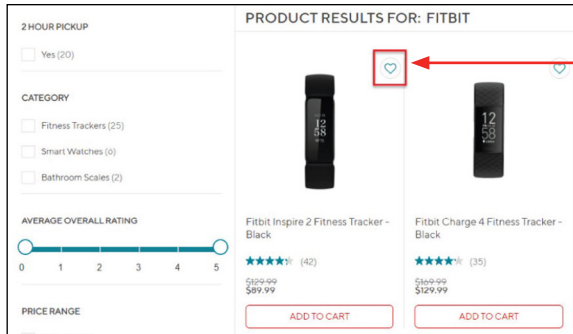


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Miscellaneous How To's

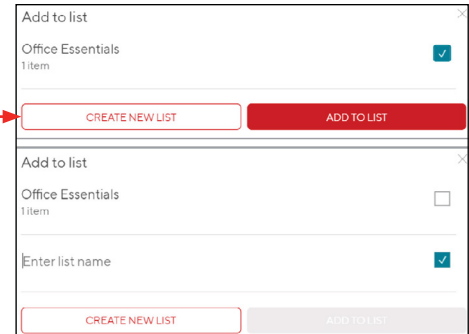
Creating a Favourites List

Step 1 To create a Favorites list, select the **Heart Icon** on the product tiles that appeared after your product search or when you selected a category page.



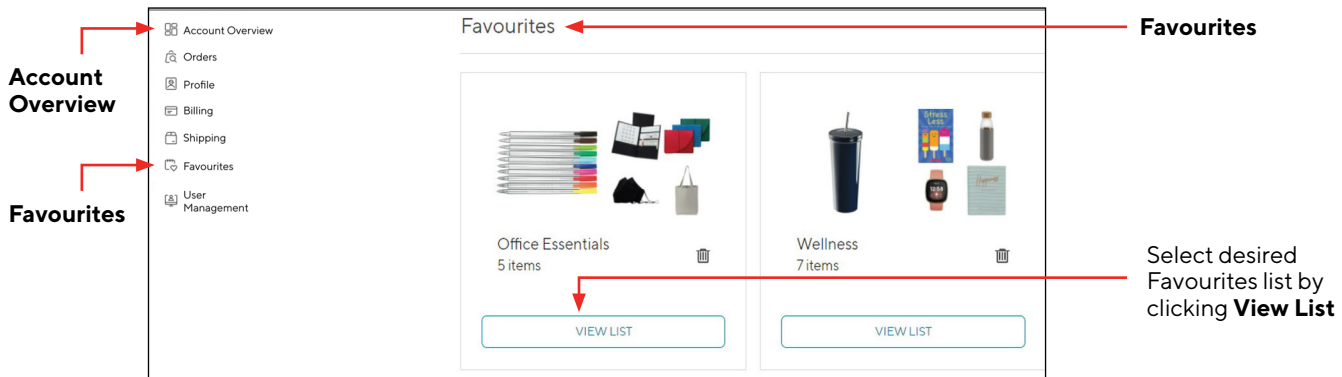
Heart Icon

Step 2 When you select the heart icon, a popup box will appear. To create a new list, select **Create New List** and give your new Favourites list a name.



Create New List

Step 3 View all your Favourites by selecting **Account Overview**. From the Account Overview list, select **Favourites**.



Account Overview

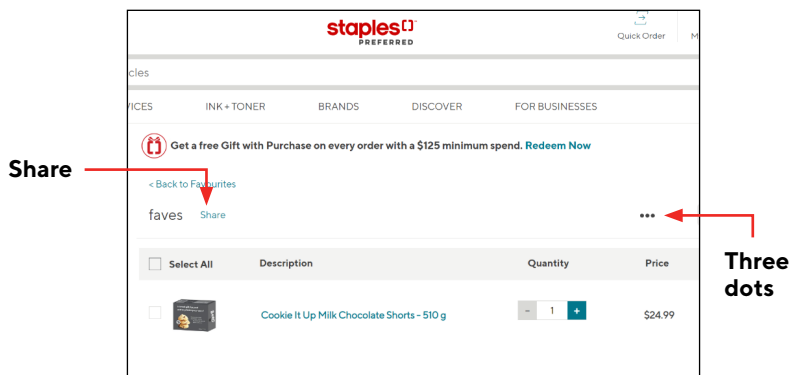
Favourites

Favourites

Select desired Favourites list by clicking **View List**

Step 4 You can also share your Favourites list with others. Select **Share** and copy the link. If you would like to rename a list or delete it, select the **three dots** located at the top of the list you wish to edit.

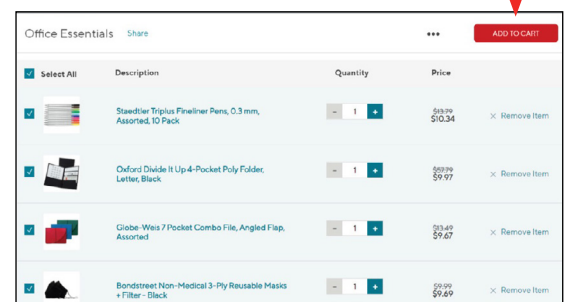
Step 5 From your list you can add items to cart. Check the box next to the products you wish to purchase and select the quantity. Then select **Add to Cart**. A pop up will appear showing the items have been added to your cart. Check out as usual.



Share

Three dots

Add to Cart



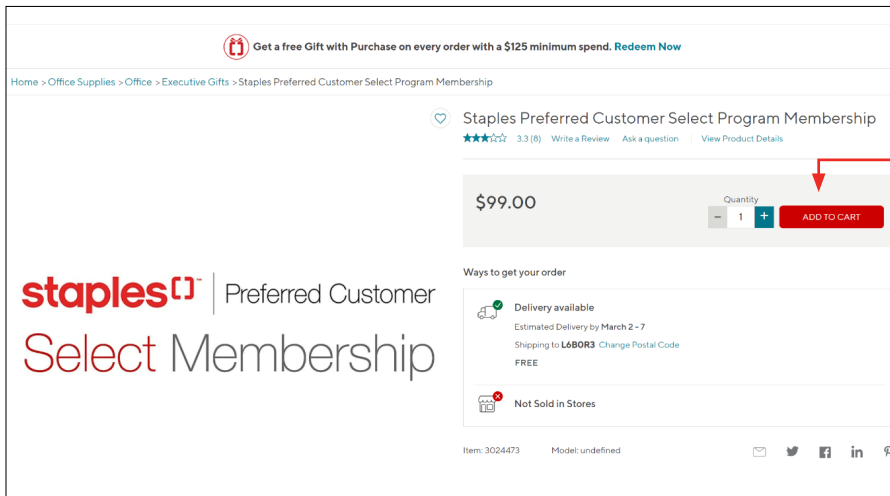
For more information, contact our Customer Service line at 1.877.907.0548 or visit the Preferred Help Centre.

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How to Renew Select Membership

Step 1 Go to [staples.ca](https://www.staples.ca) and log in to your account.

Step 2 Go to Select membership page. [Staples Preferred Customer Select Program Membership | staples.ca](https://www.staples.ca/staples-preferred-customer-select-program-membership) and add to shopping cart.



Add to Cart.

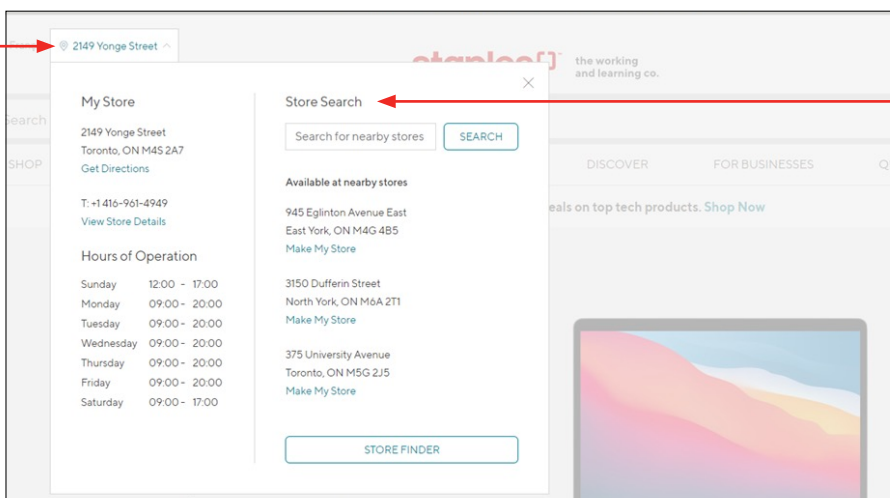
Step 3 Proceed to **Checkout** when ready.

How to Update Store Location

Step 1 Click on store location on the top left corner of the [staples.ca](https://www.staples.ca) window.

Step 2 Enter desired location address/city/postal code in **Store Search** field. A list of nearby stores will appear. Select your preferred location by clicking on **Make My Store**.

Store Location



Store Search

For more information, contact our Customer Service line at 1.877.907.0548 or visit the Preferred Help Centre.

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