



Staples 3827 Preferred Migration  
Onboarding Software

# Staples 3827 Preferred Migration Onboarding Software User Guide

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# Staples 3827 Preferred Migration Onboarding Software

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## Important Information

Exciting news! We're moving from [staplespreferred.ca](https://staplespreferred.ca) to [staples.ca](https://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](https://staples.ca).

## Create an Account

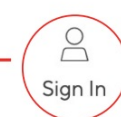
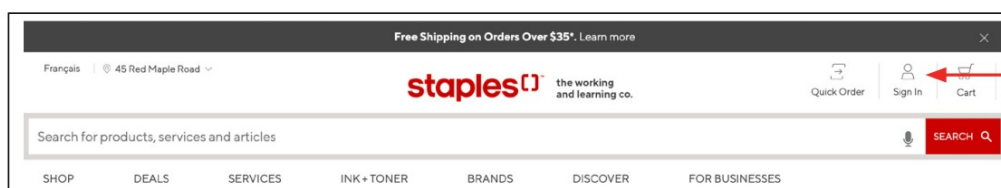
When the user visits [staples.ca](https://staples.ca), we encourage the user to sign into their account immediately to access their Preferred business pricing, benefits, and perks.

### Step 1

Go to [staples.ca](https://staples.ca) to access Staple Preferred online.

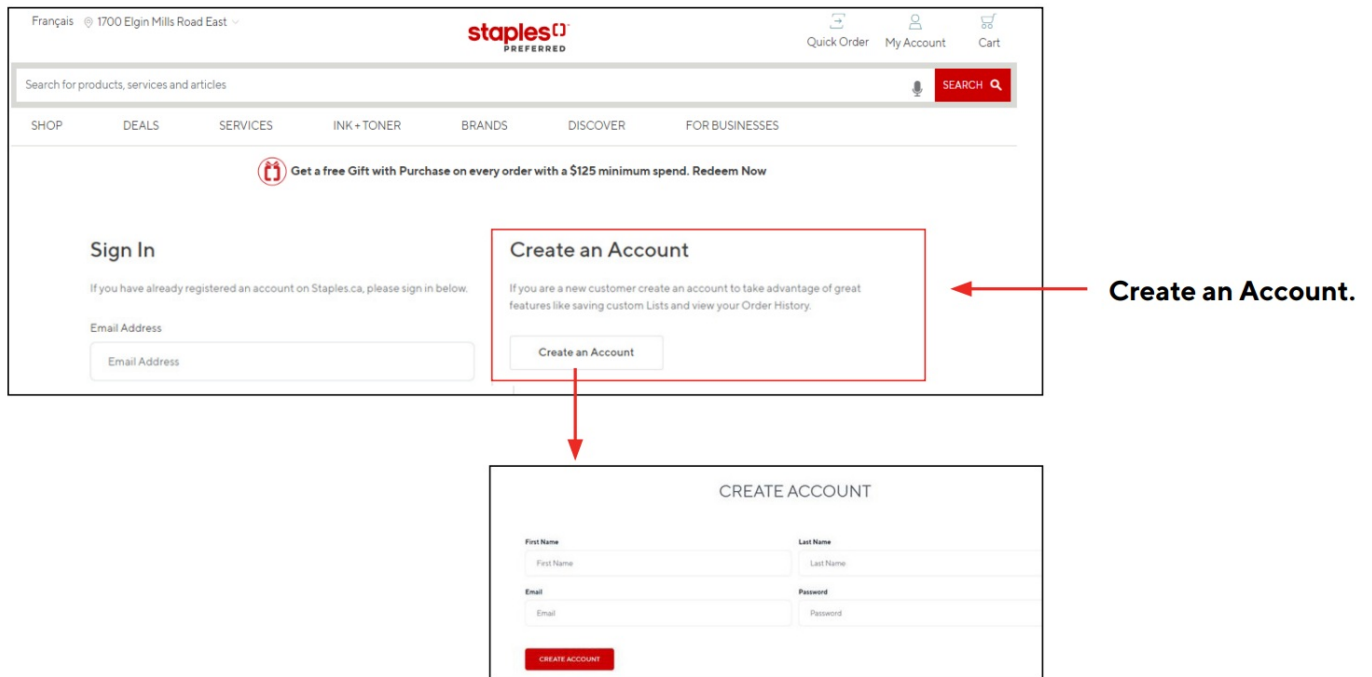
### Step 2

Sign in button on [staples.ca](https://staples.ca)

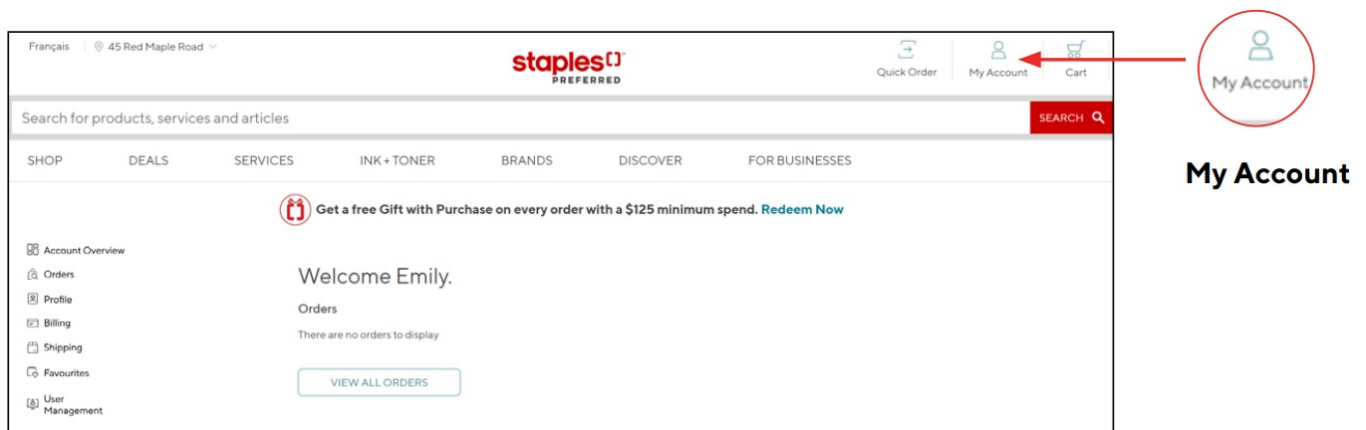


Click-on **Sign in** button.

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



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



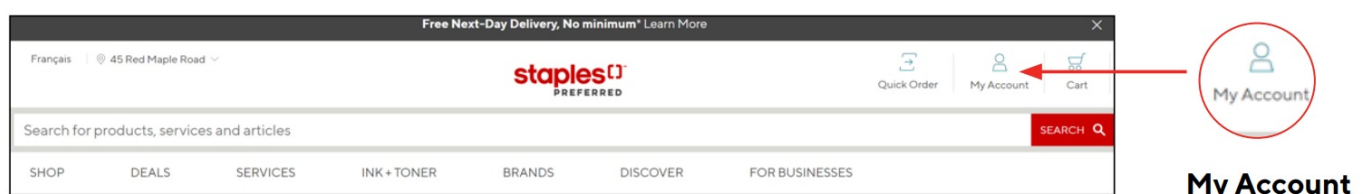
## Customer Profile Page

### Update Personal Details

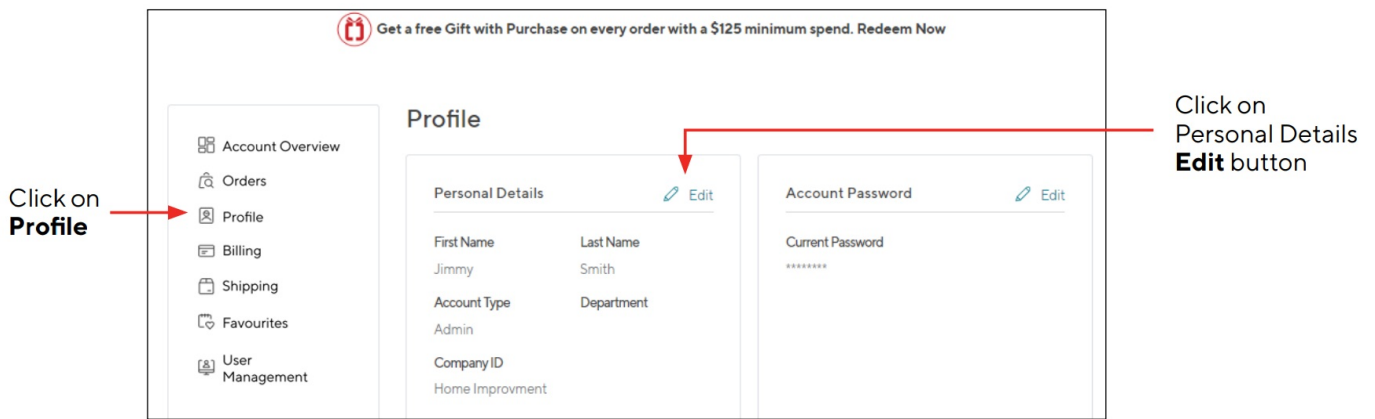
The Profile page in the Account Overview section contains vital member information.<sup>3</sup>

**Step 1** Visit [staples.ca](https://www.staples.ca) and log in to your Staples Preferred account.

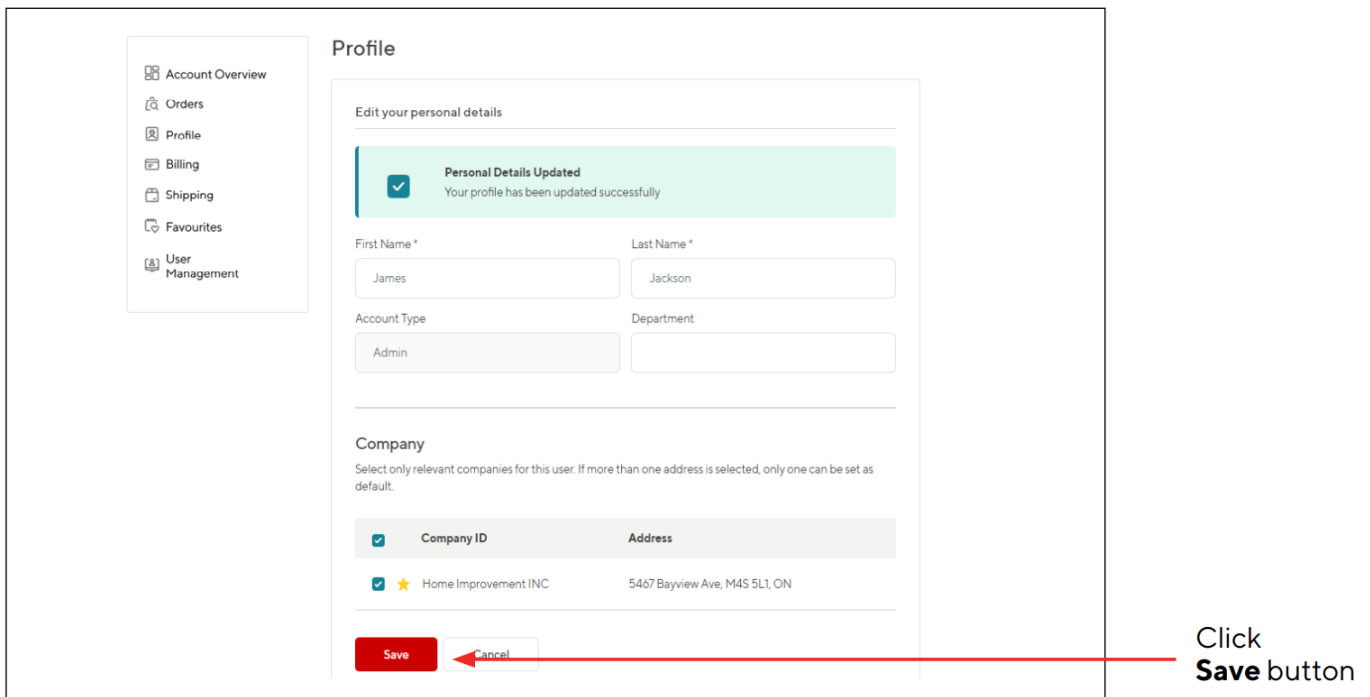
**Step 2** Click on **My Account**.



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



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

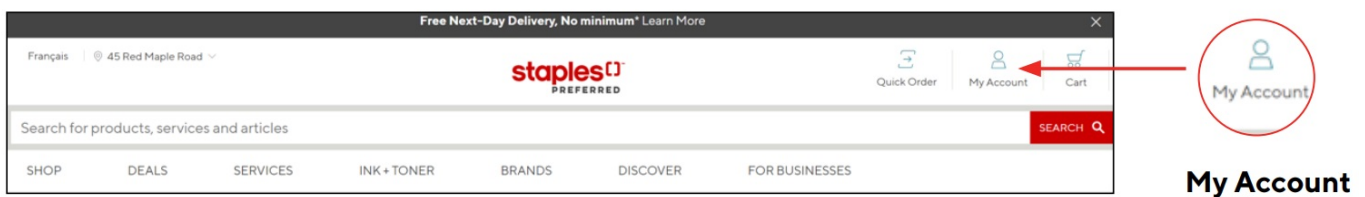


## Change Password

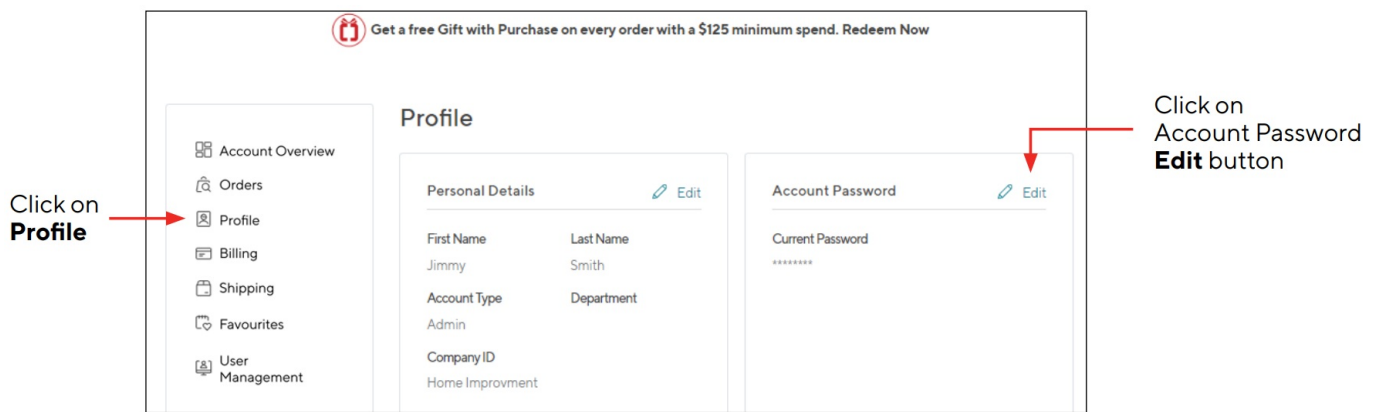
The user can update their password at any time using the following steps:

**Step 1** Visit [staples.ca](https://staples.ca) and log in to your Staples Preferred account.

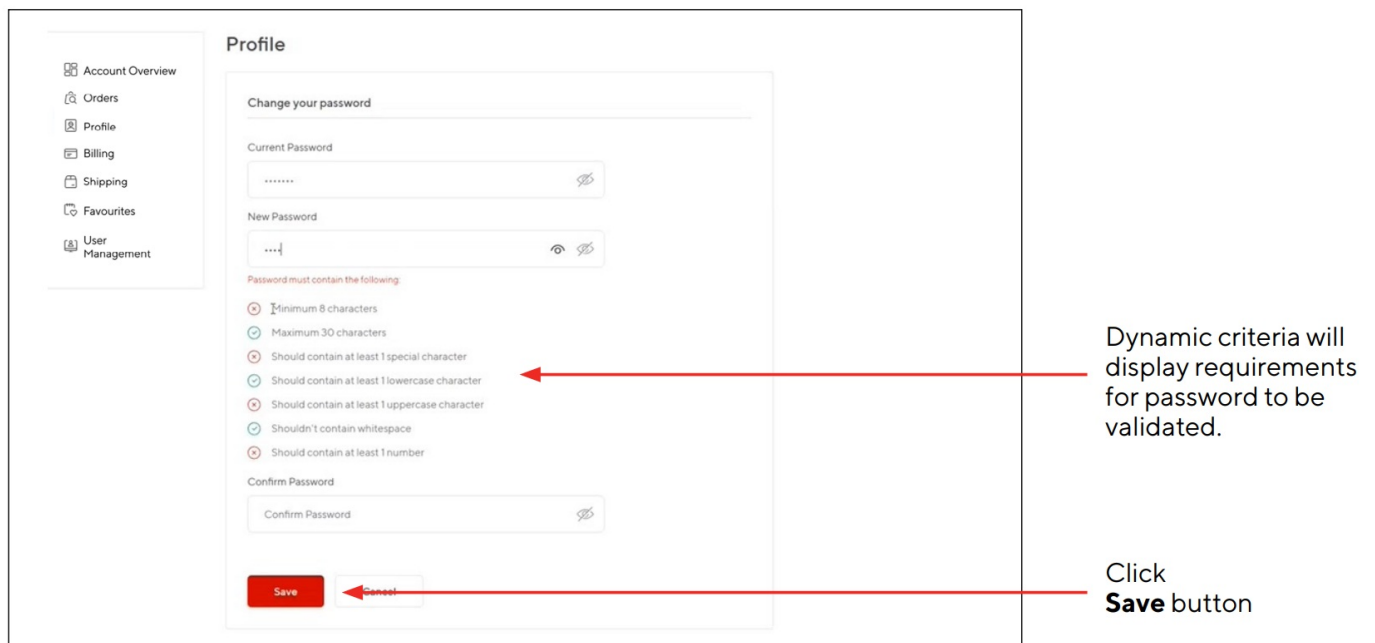
**Step 2** Click on My Account.



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



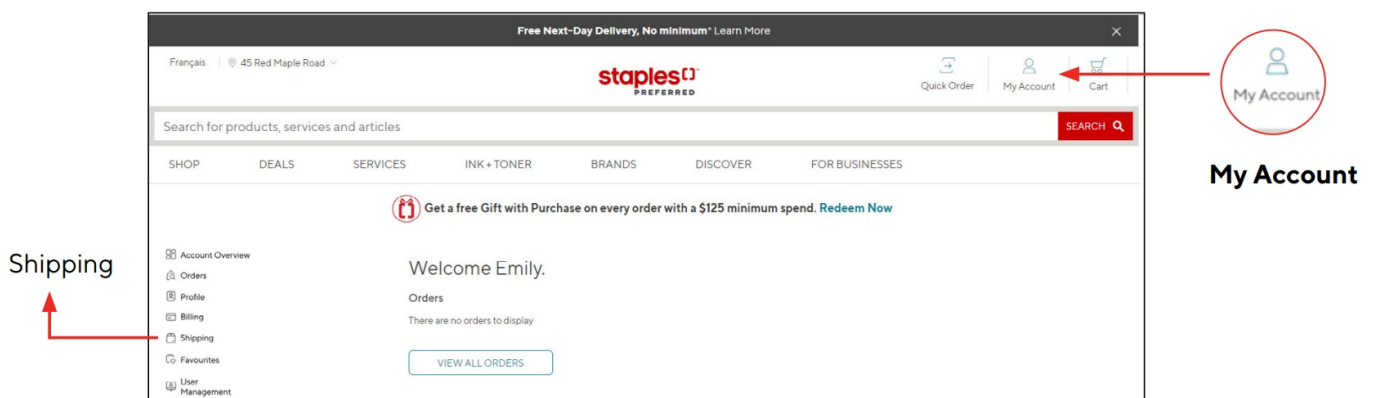
**Step 4** Enter new Password. Site will list password criteria and will dynamically validate password to ensure it meets required criteria. Password criteria will disappear once password is validated. Click on **Save**.



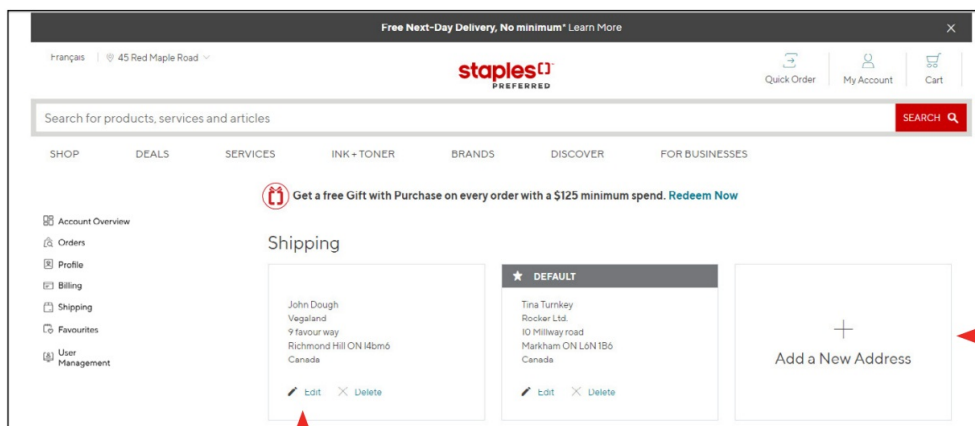
## Adding Multiple Shipping Locations

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.



To make changes to an existing shipping location, select **Edit** below the address you wish to change.

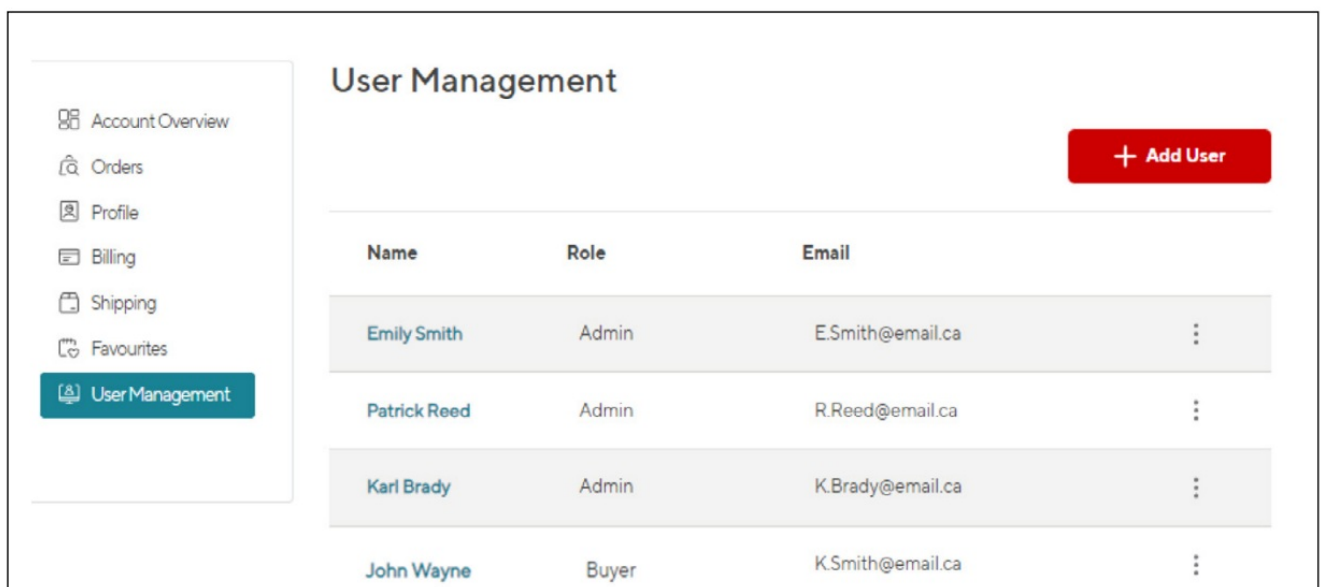
Edit the sections you wish to change. Don't forget to designate your default Shipping Address by ensuring the **"Set as default address"** box is selected in the address desired.

## User Management

### User Roles

Members can assign their users 2 role types:

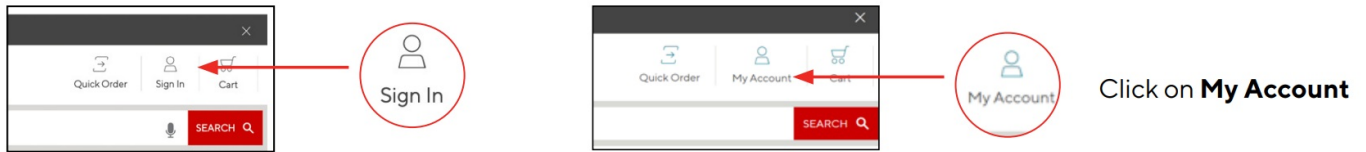
- **Admin:** Users with this role can view users in the organization, Add/Edit/Delete users, see all company orders and place orders.  
Admin roles have access to the User Management menu.
- **Buyer:** Users with this role can see and place orders. Buyer roles do not have access to the User Management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



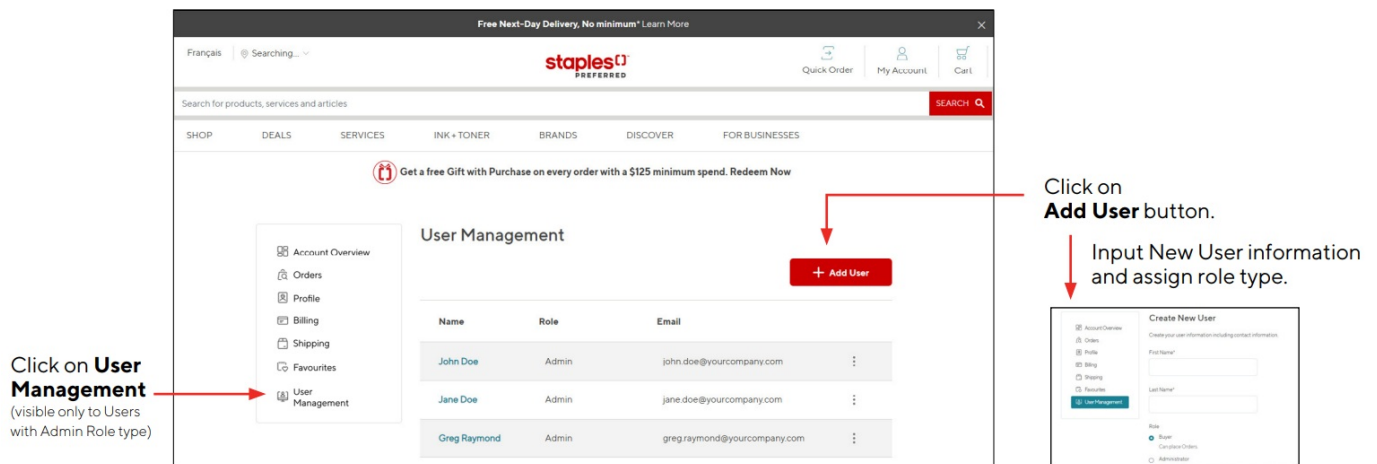
## Adding an Account

Only Users with an Admin Role can add users.

**Step 1** Visit [staples.ca](https://staples.ca) and log in to your Staples Preferred account.



**Step 2** Click on User Management in the My Account page



**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.

The screenshot shows a 'User Management' form. On the left, there is a sidebar with 'Favourites' and buttons for 'Use Management' and 'Reorder'. The main form contains the following fields: 'Last Name\*' (text input), 'Email Address\*' (text input), 'Department' (text input), 'Phone Number' and 'Extension' (two text inputs), 'Mobile Phone' (text input), and 'Fax Number' (text input). Below these is a 'Language' section with radio buttons for 'English' (selected) and 'French'. A 'Company' section follows, with a note: 'Select only relevant companies for this user. If more than one address is selected, only one can be set as default.' It contains a table with two columns: 'Company ID' and 'Address'. The table has one row with a checkbox, a star icon, the text 'Ragnarok Test 1 child (stg)', and the text 'nul, undefined, null null'. At the bottom of the form are two buttons: 'Create' (red) and 'Cancel' (grey). A red arrow points from the bottom of the form to the 'Create' button.

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.



Free Next-Day Delivery. No minimum\* Learn More

Français | @ Searching... | staples **PREFERRED** | Quick Order | My Account | Cart

Search for products, services and articles SEARCH

SHOP DEALS SERVICES INK + TONER BRANDS DISCOVER FOR BUSINESSES

Get a free Gift with Purchase on every order with a \$125 minimum spend. Redeem Now

Account Overview  
Orders  
Profile  
Billing  
Shipping  
Favourites  
User Management

### User Management

+ Add User

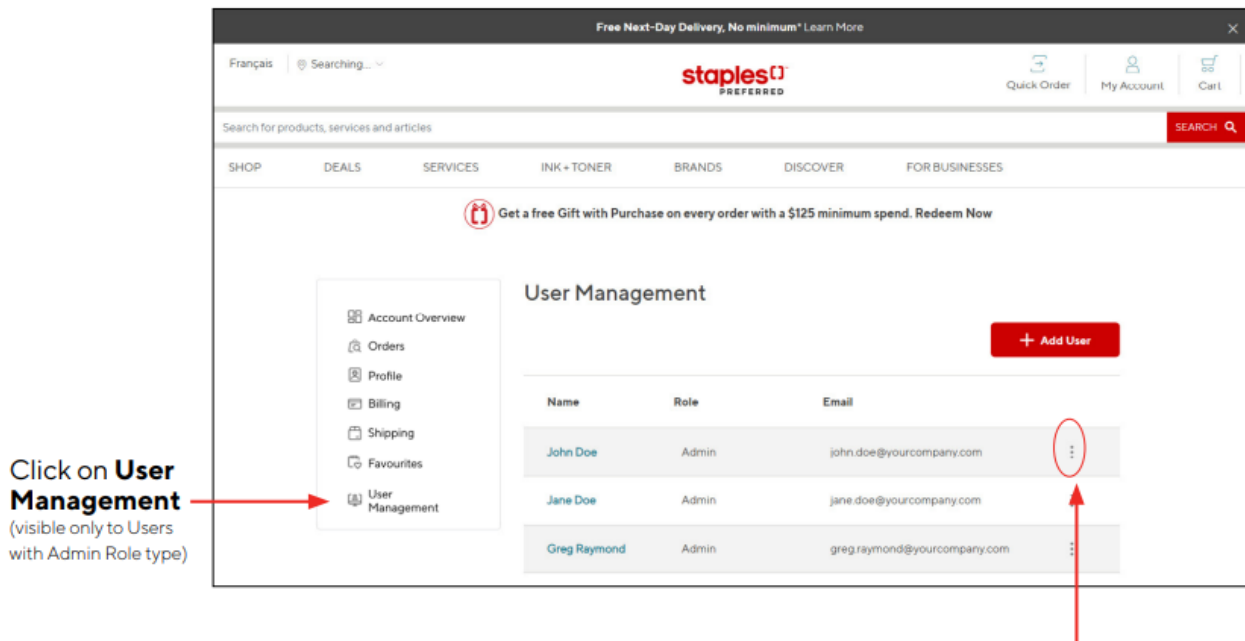
Name	Role	Email	
John Doe	Admin	john.doe@yourcompany.com	⋮
Jane Doe	Admin	jane.doe@yourcompany.com	⋮
Greg Raymond	Admin	greg.raymond@yourcompany.com	⋮

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

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

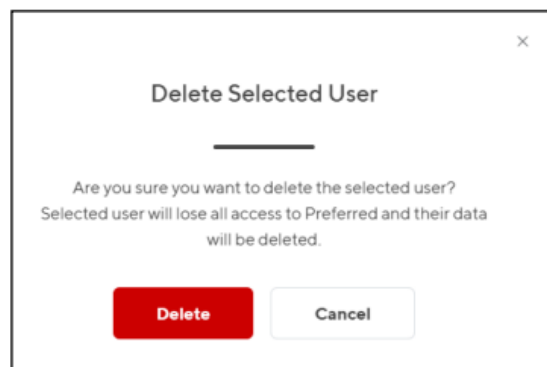
## Deleting Users

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.



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.



## 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.

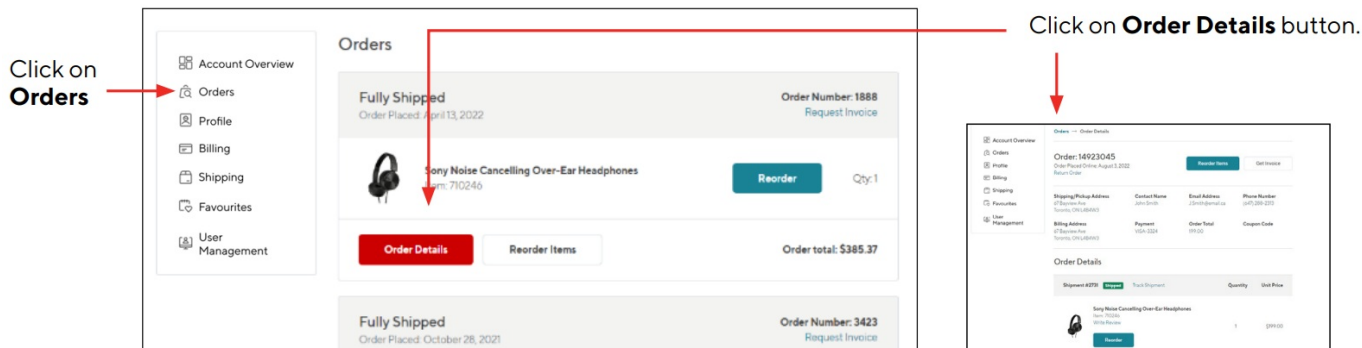
Using the menu and navigation at the top of the page you can:

- **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.

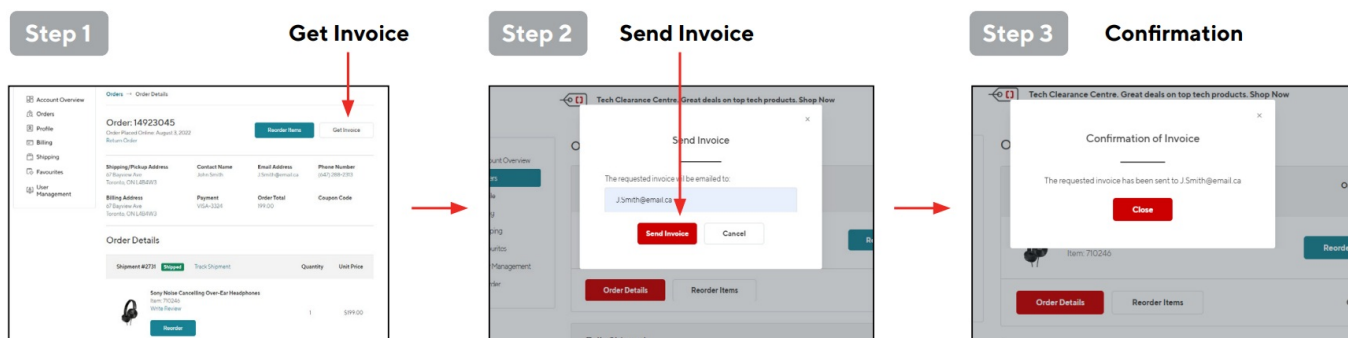
## View Previous Order / View Order Details

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



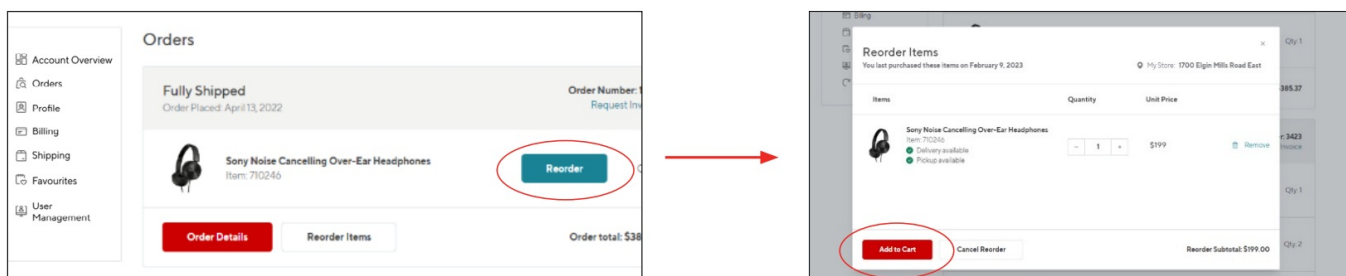
## Request Invoice

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.



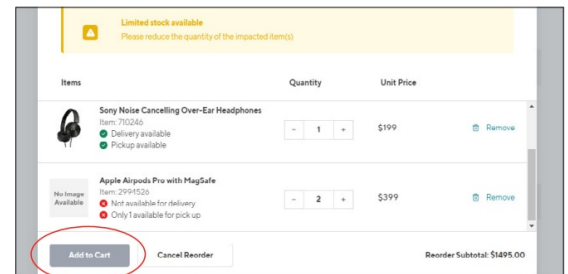
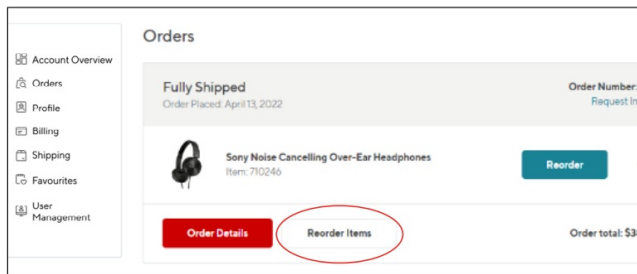
## Reorder Item

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



## Reorder Shipment

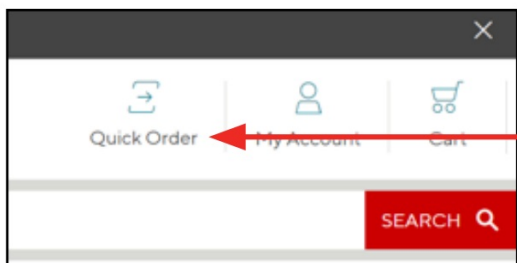
Click on **Reorder** button on the bottom of the Order.



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.

**Search**
**+ Add item**

## Quick Order

Search by item number

CLEAR
SEARCH

CIRA Adult Full Face Shields - 5 Pack  
Item #2987207

~~\$14.99~~  
\$14.54

+

Add Item

- 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

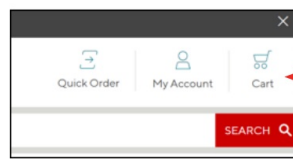
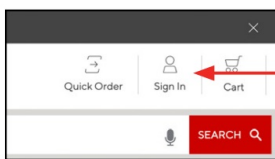
VIEW CART

## Checkout/Billing

### Checkout

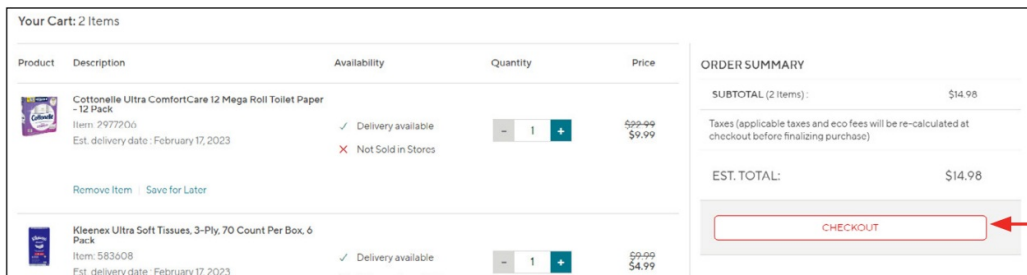
Once the user has completed shopping and ready to check out, follow these simple steps to complete their shopping experience on [staples.ca](https://staples.ca).

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



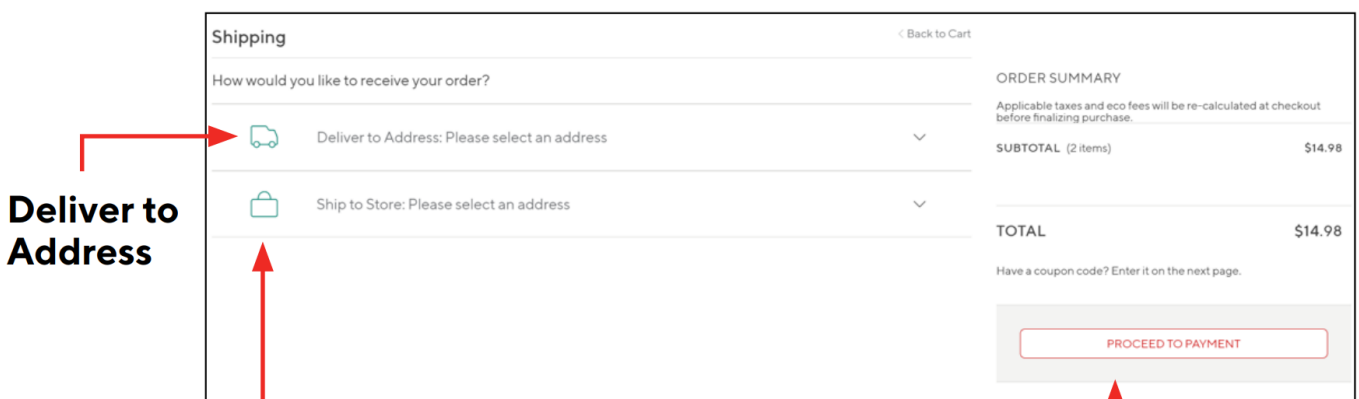
Click on **Cart**

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



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.



**Deliver to Address**

**Ship to Store**


**Proceed to Payment**

## Shipping

Which company are you ordering on behalf of?

**Company ID\***

Staples Canada Richmond Hill

 **Deliver to Address:** Please select an address

[Saved Addresses](#) [Shipping Fees](#)

## Company ID\*

**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.

**Payment Method**

☒ VISA ☐ Mastercard ☐ American Express ☐ Debit

**Payment Information**

☒ Use a new card

Card Number

MMYY CVV

☐ Remember this credit card

**Purchase order**

Purchase order number (Optional)

**Billing Address**

Select an address

SUBTOTAL (2 items) \$14.98

Shipping \$0.00

HST 13% \$1.95

**TOTAL \$16.93**

ENTER COUPON CODE

APPLY

**PLACE ORDER**

By placing your order, you agree to Staples Terms & Conditions and Privacy Policy

☐ I agree to receive promotional emails from Staples Canada. You can withdraw your consent at any time. Please refer to our [Privacy Policy](#) OR [Contact Us](#) for more details. 6 Staples Avenue Richmond Hill, ON L4B 4W3

**Enter & Apply Coupon Code**

**Place Order**

## 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**

Account Overview

Orders

Profile

Billing

Shipping

Favourites

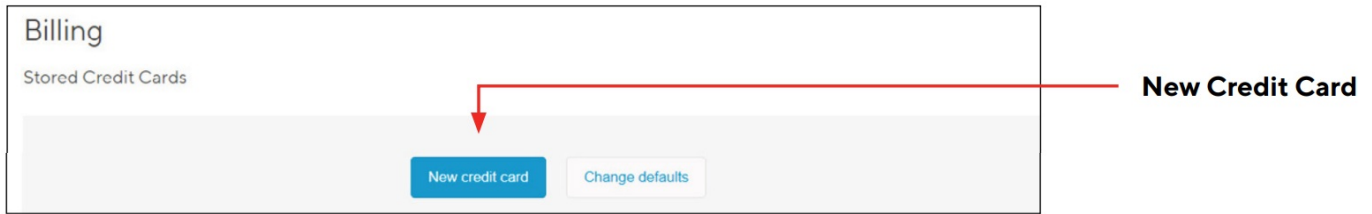
User Management

Welcome Mark.

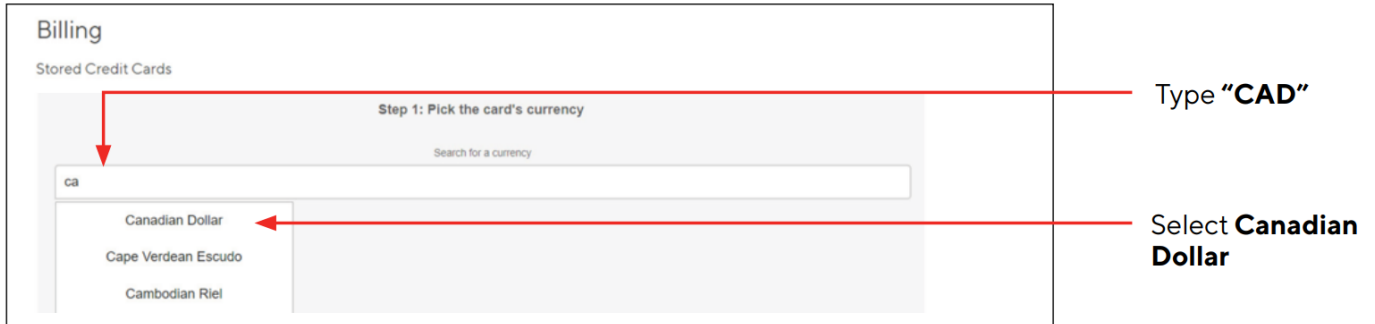
**Orders**

Order Number	Cost	Item(s)	Date Placed
13107985	\$20.94	8	July 29, 2021
12904899	\$9.71	1	July 6, 2021

**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.

The screenshot shows the 'Billing' section with the sub-header 'Stored Credit Cards'. Below this, there is a form titled 'Add your card details'. The form has two main sections: 'Card Number' and 'Credit card billing info'. The 'Card Number' section has a text input field. The 'Credit card billing info' section has several text input fields: '\*First Name', '\*Last Name', '\*Address', 'Apt, suite, etc.', '\*City', and a dropdown menu for 'Canada'. Below the 'Canada' dropdown, there is a text input field for 'Choose a province' and another for '\*Postal Code'. At the bottom of the form, there is a checkbox labeled 'Use this as your default card' and a 'Save card' button. A red arrow points to the 'Save card' button.

Check **Use this as your default card**

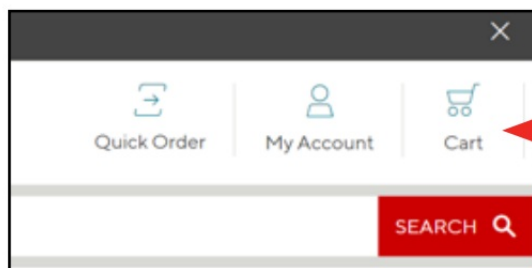
**Save card**

## Perks & Gift with Purchase

## How to add a Coupon to Your Shopping Cart

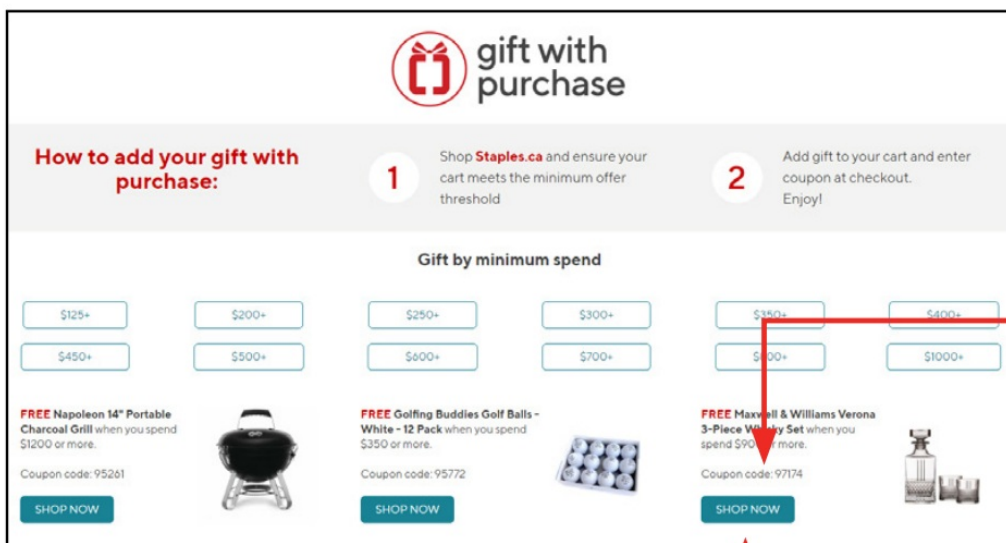
Once the member has completed their shopping, and they are ready to check out, they can follow these simple steps to complete their shopping experience on [staples.ca](https://www.staples.ca).

**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**



 Get a free Gift with Purchase on every order with a \$125 minimum spend. [Redeem Now](#)

Your Cart: 2 Items

Product	Description	Availability	Quantity	Price
	Cottonelle Ultra ComfortCare 12 Mega Roll Toilet Paper - 12 Pack Item: 2977206 Est. delivery date: February 17, 2023	✓ Delivery available ✗ Not Sold in Stores	- 1 +	<del>\$22.99</del> \$9.99
<a href="#">Remove Item</a> <a href="#">Save for Later</a>				
	Kleenex Ultra Soft Tissues, 3-Ply, 70 Count Per Box, 6 Pack Item: 583608 Est. delivery date: February 17, 2023	✓ Delivery available ✗ Pickup not available 45 Red Maple Road <a href="#">Check other stores</a>	- 1 +	<del>\$9.99</del> \$4.99
<a href="#">Remove Item</a> <a href="#">Save for Later</a>				

✗ Instore pick up not available at this store. [Change Store](#)

[Remove Item](#) [Save for Later](#)

**Saved For Later**  
You have no saved items

**ORDER SUMMARY**


SUBTOTAL (2 Items): \$14.98


Taxes (applicable taxes and eco fees will be re-calculated at checkout before finalizing purchase)

EST. TOTAL: \$14.98

[CHECKOUT](#)

**WAYS TO GET YOUR ORDER**

 **Delivery available**  
Estimated delivery: Friday, February 17, 2023  
Delivery to L6B0R  
[Change Postal Code](#)

 **Pickup not available**  
FREE Pickup in store ready within 2 hours  
Pickup at **45 Red Maple Road**  
[Check other stores](#)

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.

1. SHIPPING

2. PAYMENT

3. CONFIRMATION

**Contact Information** [Back to cart](#)


Already have an account? [Sign in](#)


First Name

Last Name

Email

**Shipping**

 Deliver to Address: Please select an address

 Ship to Store: Please select an address

**ORDER SUMMARY**

SUBTOTAL (8 Items) \$98.65

Applicable taxes and eco fees will be re-calculated at checkout before finalizing purchase.

Shipping \$0.00

**TOTAL \$98.65**

Have a coupon code? Enter it on the next page.

[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**.

**Payment Method**

VISA, Mastercard, American Express, Discover, Flexity

**Payment Information**

☒ Use a new card

Card Number

MMYY CVV

☐ Remember this credit card

**Purchase order**

Purchase order number (Optional)

**Billing Address**

Select an address  
Enter a new address

**ORDER SUMMARY**

SUBTOTAL (2 items)	\$14.98
Shipping	\$0.00
HST 13%	\$1.95
<b>TOTAL</b>	<b>\$16.93</b>

**ENTER COUPON CODE**

By placing your order, you agree to Staples [Terms & Conditions](#) and [Privacy Policy](#)

☐ I agree to receive promotional emails from Staples Canada. You can withdraw your consent at any time. Please refer to our [Privacy Policy](#) OR [Contact Us](#) for more details. 6 Staples Avenue Richmond Hill, ON L4B 4W3

## 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.

**ORDER SUMMARY**

Discounts	-\$19.99
<b>SUBTOTAL (2 items)</b>	<b>\$310.98</b>
Shipping	\$0.00
HST 13%	\$37.83
<b>TOTAL</b>	<b>\$328.82</b>

**ENTER COUPON CODE**

83730

83730

**Discounts**

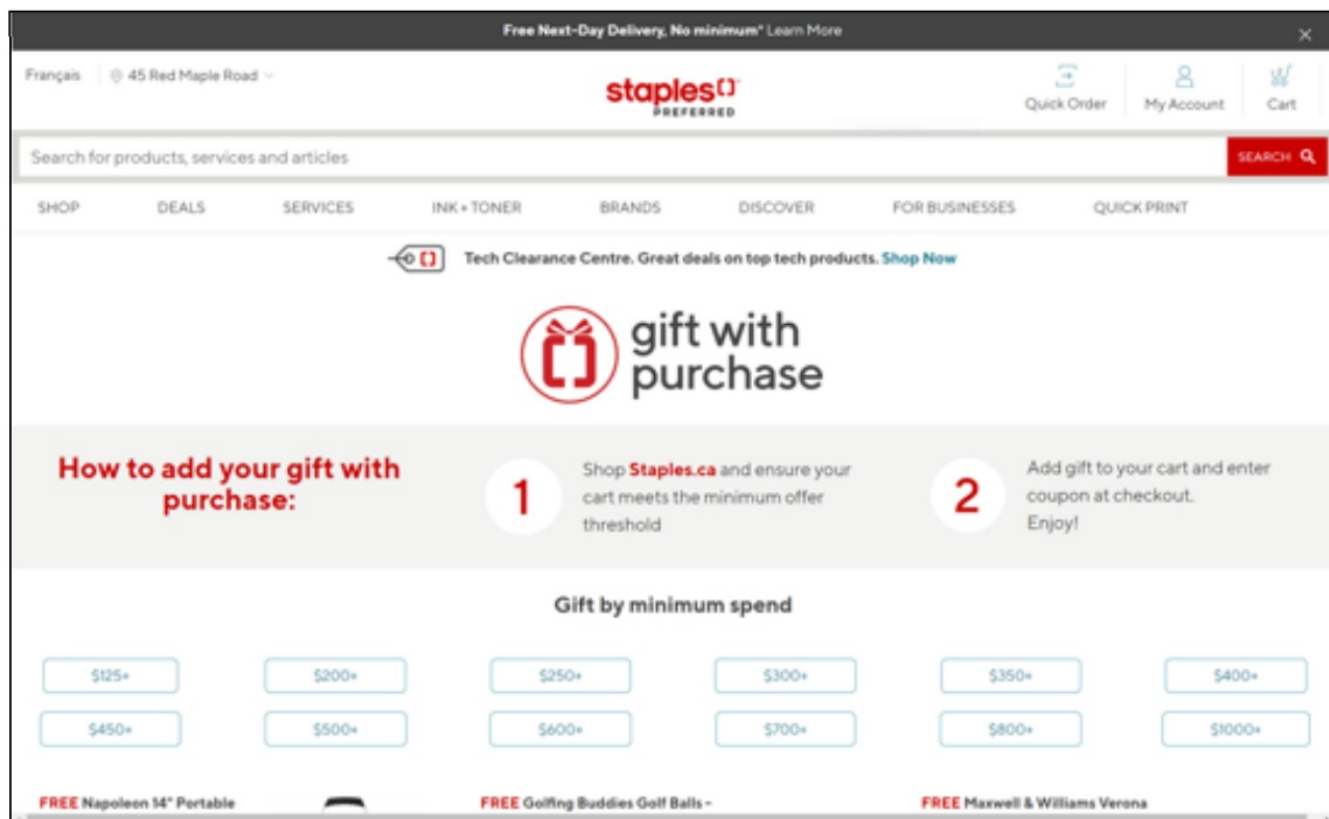
**Place Order**

## 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](#).



### 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**

Staples Copy Paper - 20 lb. - 8.5\" x 11\" - White - 1500 Sheets

Item: 3001018  
Est. delivery date: February 28, 2023

✓ Delivery available

✓ Pickup available  
2149 Yonge Street  
Check other stores

- 2 +

~~\$24.99~~  
\$24.24

Remove Item

Save for Later

Gift With Purchase

Congratulations, you have qualified for a gift with your purchase.  
Check out all our available gifts [here](#).

\$125+

\$175+

\$250+

\$300+

\$350+

\$400+

Jelly Belly Candy 240g  
20 Assorted Flavours Gift Box

ADD TO CART

Splash 20 Oz Tumbler  
With Straw

ADD TO CART

Gourmet Village  
Chocolate Brownie  
Skillet - 200g

ADD TO CART

SUBTOTAL (3 Items): \$257.02

Taxes (applicable taxes and eco fees will be re-calculated at checkout before finalizing purchase)

Your order qualifies for a free Gift With Purchase.  
Choose your gift now. [Redeem gift](#)

EST. TOTAL: \$257.02

CHECKOUT

WAYS TO GET YOUR ORDER

Delivery not available  
Delivery to M4S 2A7  
[Change Postal Code](#)

Pickup available  
FREE Pickup in store ready within 2 hours  
Pickup at **2149 Yonge Street**  
[Check other stores](#)

## 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.

2 HOUR PICKUP

☐ Yes (20)

CATEGORY

☐ Fitness Trackers (25)

☐ Smart Watches (0)

☐ Bathroom Scales (2)

AVERAGE OVERALL RATING

012345

PRICE RANGE

PRODUCT RESULTS FOR: FITBIT

Fitbit Inspire 2 Fitness Tracker - Black

★★★★★ (42)

~~\$129.99~~  
\$89.99

ADD TO CART

Fitbit Charge 4 Fitness Tracker - Black

★★★★★ (35)

~~\$169.99~~  
\$129.99

ADD TO CART

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

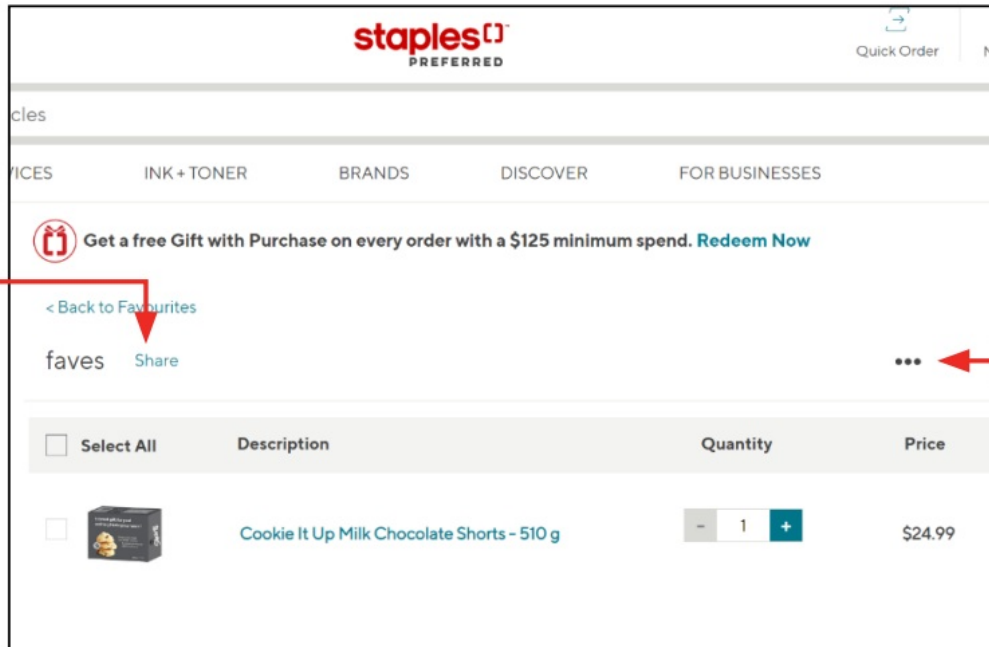
The top screenshot shows a dialog box titled 'Add to list' with a close button (X) in the top right corner. It contains the text 'Office Essentials' and '1 item' on the left, and a blue checkmark icon on the right. Below this, there are two buttons: 'CREATE NEW LIST' (highlighted with a red arrow) and 'ADD TO LIST' (in red). The bottom screenshot shows the same dialog box, but the 'CREATE NEW LIST' button is disabled (greyed out). The 'Enter list name' field is now visible, with a blue checkmark icon to its right.

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

The screenshot shows the 'Account Overview' page. On the left is a sidebar menu with items: Account Overview, Orders, Profile, Billing, Shipping, Favourites, and User Management. The 'Favourites' item is highlighted. The main content area is titled 'Favourites' and displays two list cards. The first card is titled 'Office Essentials' and shows '5 items'. It has a 'VIEW LIST' button at the bottom. The second card is titled 'Wellness' and shows '7 items'. It also has a 'VIEW LIST' button at the bottom. Red arrows point from the 'Account Overview' menu item to the 'Favourites' section header, and from the 'VIEW LIST' button of the 'Office Essentials' list to the text '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.

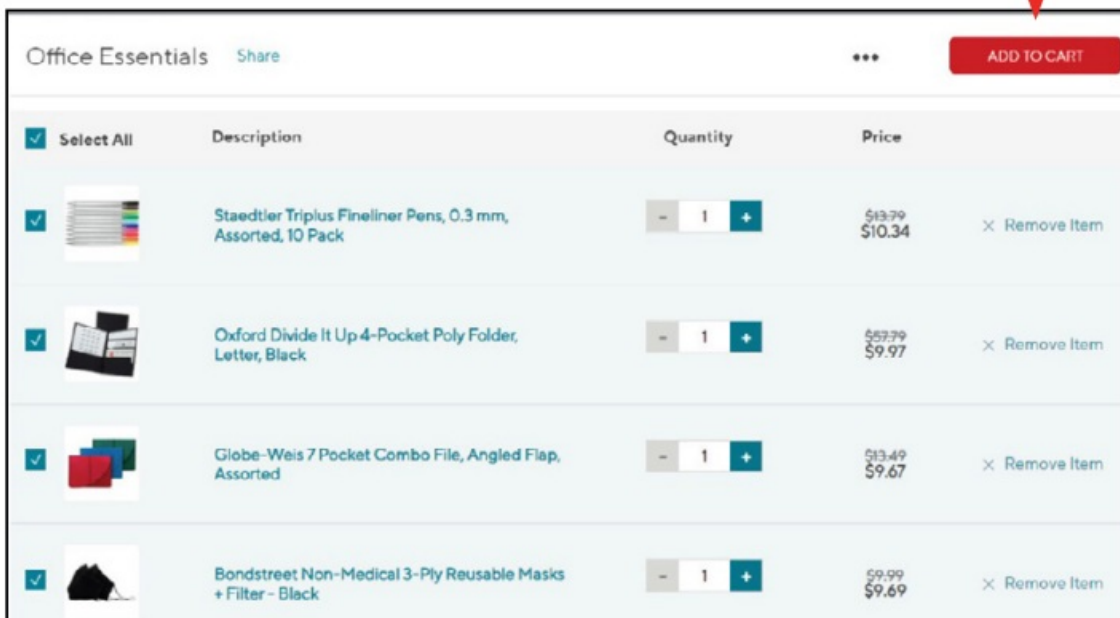
Share



Three dots

**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.

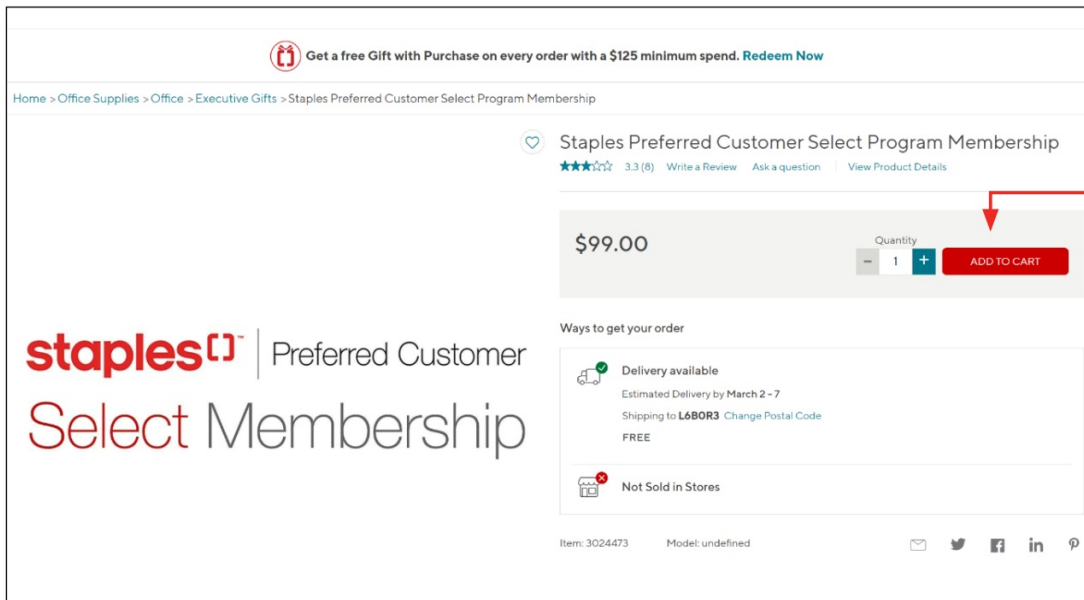
Add to Cart



## How to Renew Select Membership

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

**Step 2** Go to Select membership page. [Staples Preferred Customer Select Program Membership](https://staples.ca) | [staples.ca](https://staples.ca) and add to shopping cart.



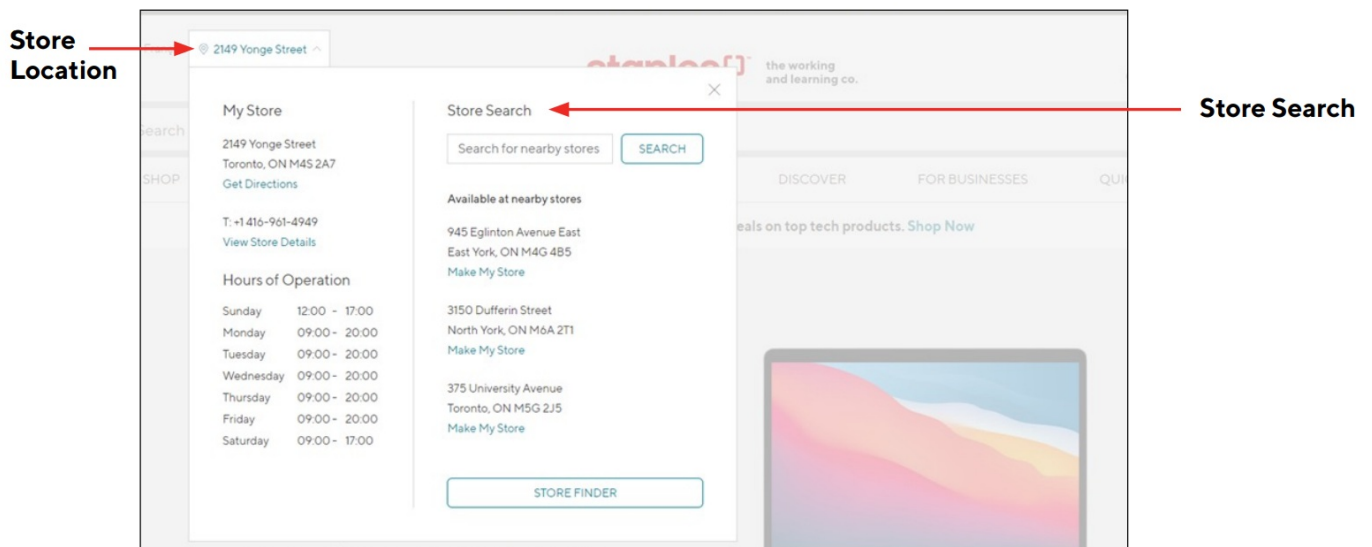
Add to Cart.

**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**.

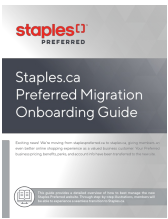


## Customer Support

[For more information, contact our Customer Service line at 1.877.907.0548 or visit the Preferred Help Centre.](https://www.staples.ca/customer-service)



## Documents / Resources

	<p><a href="#">Staples 3827 Preferred Migration Onboarding Software</a> [pdf] User Guide 3827 Preferred Migration Onboarding Software, 3827, Preferred Migration Onboarding Software , Migration Onboarding Software, Onboarding Software, Software</p>
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## References

- [\[S\] Staples.ca: Next-Day Shipping, On All Orders](#)
- [\[S\] Staples | staples.ca](#)
- [\[S\] Staples | staples.ca](#)
- [\[S\] Staples Preferred Customer Select Program Membership | staples.ca](#)
- [User Manual](#)

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