User's Manual

About MyWiLS

MyWiLS (https://www.wils.org/mywils/) is WiLS' online subscription management portal that lets you update your contact information, approve orders or subscription renewals, and see information about your current and past purchases.

This documentation will help you use MyWiLS, but as always, WiLS staff is happy to help you with anything you need regarding your cooperative purchasing services, including help using MyWiLS.

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Logging In and Out

To log in, go to https://www.wils.org/mywils/ and enter your username and password. If this is your first time logging in, click on Create Account and follow the instructions.

To log out, click on your username in the top right and click sign out from the dropdown menu.

To change your password, click on your username in the top right and click change password from the dropdown.

MyWiLS Sections
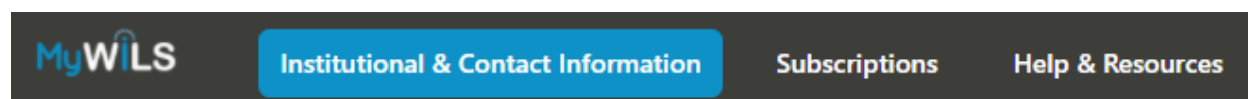
Institutional & Contact Information – Information about your account (phone, fax, address, etc.) and contact information for you and your coworkers.

Subscriptions – A panel of tabs showing your subscriptions in their various stages of the order/renewal process.

Help & Resources – a link directing you to https://www.wils.org/mywils-resources/ which includes this document and various forms you can fill out for additional information

Institutional & Contact Information – Updating your Institution Information

In the **Institutional & Contact Information** section, you can view and edit some of the information for your institution. You can expand and collapse the Institutional Information by clicking on the plus or minus sign next to your institution name.

The fields you can edit are: Website and Invoicing Preferences.

Invoicing Preferences are account-wide and can include instructions such as mail, email to specific contact, invoice all on one, invoice by subscription start date, etc.

To update, simply click in the field you wish to update and add or change the data. Click "Save" to update your changes.

If you notice incorrect information in a field you cannot edit, please email coop@wils.org to let us know.

## Institutional & Contact Information – Updating your Contact Information

Below the Institution Information is a list of the individual contacts linked to your institution. All information for contacts can be updated except for a contact's name.

You can expand and collapse the contact information by clicking on the contact name.

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To update a contact, scroll down to the contact you wish to update. Click in the field you wish to update and add or change the data. Or if you are updating a checkbox, simply check or uncheck the box. When you have changed the data you wish to change, click "Save." **Be sure to click "Save" for each contact you change.**

If you notice the spelling is incorrect for your name, or you wish to add or remove a contact, please email coop@wils.org to let us know.

Subscriptions – The Different Tabs
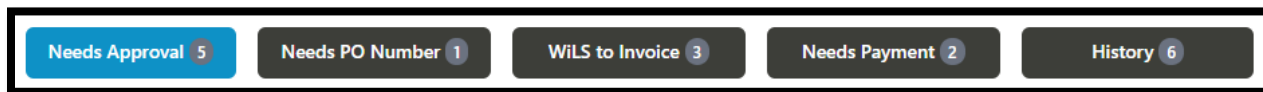
Needs Approval – Your subscriptions (new or renewing) that require a response. You can submit your order/renewal and billing preferences here.

Needs PO Number – Subscriptions that need a purchase order number before WiLS can invoice.
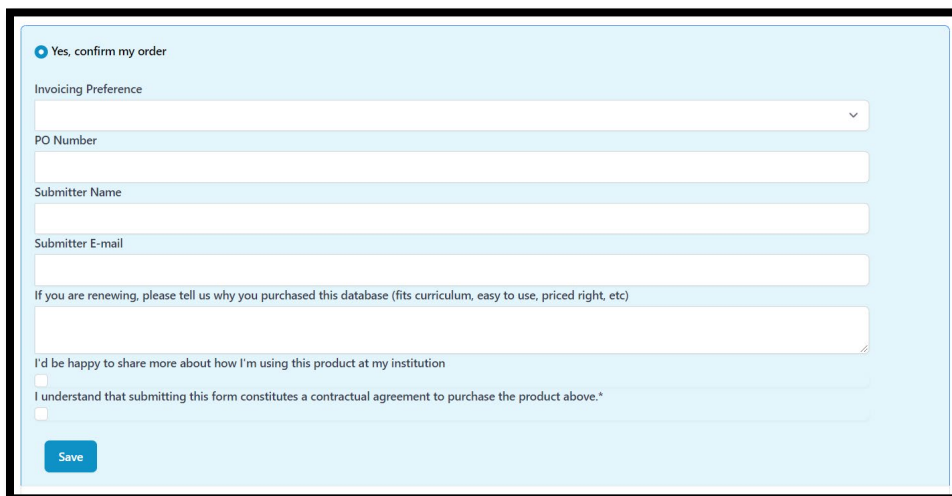
WiLS to Invoice – Subscriptions you have ordered but WiLS has not yet invoiced.

Needs Payment – Subscriptions you have ordered that WiLS has invoiced but payment is not yet received.

History – Past subscriptions that have been invoiced and paid, as well as any subscriptions you chose not to renew.

Subscriptions – Submitting a New Order or Renewal

1. In the **Subscriptions** section, click on the **Needs Approval** tab.
2. Find the subscription you wish to submit by scrolling until you find it. You can sort the list of subscriptions by Start Date or by Vendor Name.
   a. **For K12 members, your account may display subscriptions for multiple schools within your district.**
   b. You can find which specific school the subscription is for by looking in the Subscription Notes field.
3. Click "Yes, confirm my order" to order/renew, and options will appear.

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4. Choose your Invoicing Preference from those listed.
   a. *Waiting for PO* – If you wish to send WiLS a purchase order, please choose this option. Please note that WiLS will not send an invoice until the PO or PO number is received.
   b. *Invoice Now* – Choose this option if you wish to receive an invoice now. Please note that it might take 3-5 business days to receive the invoice. An optional PO # field will appear. If your institution uses PO #s, you may enter it here to be referenced on the invoice.
   c. *Invoice Later* – Choose this option if you wish to receive your invoice on a future date. You can choose which date you wish to be invoiced on by entering it in the Preferred Invoice Date field. We will try our best to invoice you as close as possible to that date, but please allow up to 10 business days from the date you select. An optional PO # field will appear. If your institution uses PO #s, you may enter it here to be referenced on the invoice.
   d. *Deduct from Deposit Account Now* – Choose this option if you wish to have your subscription amount deducted from your deposit account. An optional PO # field will appear. If your institution uses PO #s, you may enter it here to be referenced on the invoice. **Please note, not all accounts have a deposit account with WiLS.** If you choose this option and you do not have a deposit account, we will contact you to discuss your options.
   e. *Deduct from Deposit Account Later* – Choose this option if you wish to have your subscription amount deducted from your deposit account at a later date. You can choose which date you wish to have this deducted on by entering it in the Preferred Invoice Date field. We will try our best at WiLS to deduct from your account as close as possible to that date, but please allow up to 10 business days from the date you select. An optional PO # field will appear. If your institution uses PO #s, you may enter it here to be referenced on the invoice. **Please note, not all accounts have a deposit account with WiLS.** If you choose this option and you do not have a deposit account, we will contact you to discuss your options.
5. Enter your name and email address in the Submitter Name and Submitter Email Address fields.
6. If you have comments about why you are ordering/renewing a specific product, you may enter it in the text box (fits curriculum, easy to use, priced right, etc). This is an optional text box.
7. If you are willing to share how you are using your product with WiLS staff and/or other WiLS members, check the box. This is optional.
8. Check the box stating that you understand that submitting this form constitutes a contractual agreement to purchase the product listed.
9. Click on Submit to submit this order. **Please note that if you have multiple orders to submit, you must submit one at a time.** Clicking Submit will refresh the page, so please enter your renewal/billing preferences one at a time as well.

Subscriptions – Not Ordering or Not Renewing
1. In the **Subscriptions** section, click on the **Needs Approval** tab.
2. Find the subscription you do not wish to order/renew by scrolling until you find it. You can sort the list of subscriptions by Start Date or by Vendor Name.
   a. **For K12s, your account may display subscriptions for multiple schools within your district.**
   b. You can find which specific school the subscription is for by looking in the Subscription Notes field.

3. Click "No, do not confirm my order" to cancel the subscription/order.

4. Enter your name and email address in the Submitter Name and Submitter Email Address fields. We use this information to track who is canceling the order.
5. You must enter a reason for not ordering/renewing in the text box. Budget cuts and low usage are common reasons.
6. Check the box stating that you understand that submitting this form will cancel your subscription and access will be turned off at the end of the current subscription term.
7. Click on Submit to submit this order. **Please note that if you have multiple orders to submit, either ordering or not ordering, you must submit one at a time.** Clicking Submit will refresh the page, so please enter your renewal/billing preferences one at a time as well.

Subscriptions – Submitting a PO Number

1. In the **Subscriptions** section, click on the **Needs PO Number** tab.
2. Find the subscription you need to submit a PO number for by scrolling until you find it. You can sort the list of subscriptions by Start Date or by Vendor Name.
   c. **For K12s, your account may display subscriptions for multiple schools within your district.**
   d. You can find which specific school the subscription is for by looking in the Subscription Notes field.
3. Enter the PO number for each subscription.

4. Click Submit. **Please note that if you have multiple PO numbers to submit/subscriptions to update, you must submit one at a time.** Clicking Submit will refresh the page.
5. Don't forget, you can use one PO number for multiple subscriptions!

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FAQs

I already ordered something. When will I be invoiced?

A good check to see when you will be invoiced is to go to the **WiLS to Invoice** tab. Anything that hasn't yet been billed by WiLS will show up here.

If you have chosen Invoice Now, you can expect to receive an invoice via email within 3-5 business days.

If you have chosen Invoice Later, you can expect to receive an invoice within 10 business days of your preferred invoice date.

If you are not seeing a subscription that you have taken action on, check the **History** tab to make sure it's not listed there. If you still have questions, please email coop@wils.org.

Have I been invoiced?

To see if you've been invoiced, first check the **WiLS to Invoice** tab. Any subscription that hasn't been invoiced yet will appear here.

If you don't find what you are looking for, click on the **Needs Payment** tab. This tab will show any subscriptions that have been invoiced, but WiLS hasn't received payment for yet. You can also check the **Needs PO Number** tab to see if WiLS is waiting for a PO before invoicing.

If you still don't find what you are looking for, it likely has already been invoiced and paid and will appear in the **History** tab.

If you are not seeing a subscription that you believe should appear, or if you have questions, please email coop@wils.org.

Have I paid my invoice?

To see if you have paid your invoice, click on the **Needs Payment** tab. This will show any subscriptions that have been invoiced, but for which WiLS hasn't received payment.

If you don't find what you are looking for, it probably has already been paid and will appear in the **History** tab.

If you are not seeing a subscription that you believe should appear, or if you have questions, please email coop@wils.org.

What have I ordered in the past?

To see past orders, click on the **History** tab. This will show all your orders that have been invoiced and paid. This will show subscriptions that started in the current fiscal year and the fiscal year prior (the fiscal year for WiLS runs July – June).

Can I see which subscriptions I chose not to order/renew?

To see what you chose not to order or renew in the past, click on the **History** tab. This will show all your declined orders that were to start in the current fiscal year and the fiscal year prior (the fiscal year for WiLS runs July – June).

When do I need to submit an order?

To ensure uninterrupted access, orders must be submitted at least 15 days before the subscription start date. This will allow WiLS the time to update your preferences and notify the vendor. While we'll do our

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best to make sure your order is processed, uninterrupted access cannot be guaranteed for orders submitted after this time period.

Where are my subscriptions? I know I have more!

If we do not have pricing from a vendor, the subscription will not appear in the portal. As soon as we have pricing, we will update your account and the subscription will appear in the **Needs Approval** tab until you submit the order.

Will I be notified when pricing is available?

Yes! We will send you an email for each subscription when pricing becomes available and needs your approval. Notification emails are sent to the appropriate cooperative purchasing contact for that subscription.

Can I download a copy of my subscription for my records?

Yes! You can download any piece of subscription information you need as a PDF from any tab in the **Subscriptions** section by clicking the download icon ( ) next to the name of the subscription.