



MyWiLS

USER MANUAL

About MyWiLS

MyWiLS (<https://www.wils.org/mywils/>) is WiLS' online subscription management portal that lets you update your contact information and invoicing preferences, 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. Reach out to us at coop@wils.org if you have any questions.

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Logging In and Out

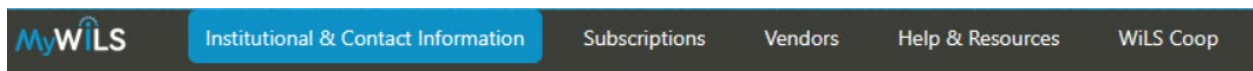
To log in, go to <https://www.wils.org/mywils/> and enter your username and password. If this is your first time logging in, click on Register and follow the instructions.

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.

If you have forgotten your password, click Forgot Your Password to reset it. The password reset link is active for 12 hours.

MyWiLS Sections



Institutional & Contact Information – Information about your account (address, website, invoicing and statement preferences) and contact information for you and your coworkers.

Subscriptions – Your subscriptions in their various stages of the order and renewal process.

Vendors – Vendor descriptions, links to their website, products available, license agreements, and discount codes. (You can still browse all the vendors and products we offer [on our website](#) as well.)

Help & Resources – A link to <https://www.wils.org/mywils-resources/> which includes this User Manual and other resources to help you make best use of WiLS Cooperative Purchasing program.

WiLS Coop – A link to <https://www.wils.org/do/coop/> so you can easily access information you need about WiLS Cooperative Purchasing services.

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.

Here, you can add or edit your website and update your invoicing instructions & recipients, purchase order requirements, and monthly billing statement preferences & recipients. Invoicing Instructions are account-wide and can include instructions such as to deliver invoices by mail or email, to include all purchases on one invoice, to invoice by subscription start date, etc.

There are three types of monthly billing statements, and you can choose any and all that you would like to receive. These are account-wide and we cannot send different statement types to different recipients.

- *Open Items*: This allows you to see all of your open or unpaid invoices from WiLS. We're hoping these statements will allow you to see unpaid invoices you may have overlooked and pay them before we send out overdue notices. If you don't have any open/unpaid invoices on the first business day of the month, you won't receive a statement for that month.
- *Monthly Balance*: This will only show invoices or payments made in the previous month along with a "Balance Fwd" line at the top of the report that shows any balance from prior months.
- *Current Fiscal Year*: This will show all invoices sent and payments received in the current fiscal year (July – June). Any unpaid invoices in previous fiscal years will be shown as a lump sum in a "Balance Fwd" line at the top of the report.

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

If your participation in the Cooperative Purchasing Program has expired, it will appear in red at the bottom of the Institutional Information section. Contact us at coop@wils.org if you believe this is in error.

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

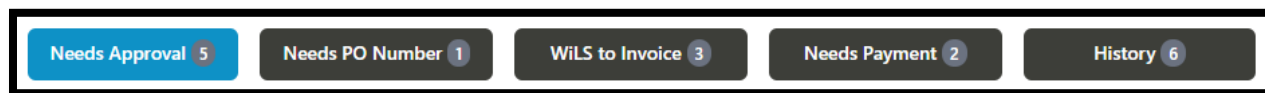
Below the Institutional Information is a list of the individual contacts linked to your institution. All information for contacts can be updated except for a contact's name.

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

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. 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.

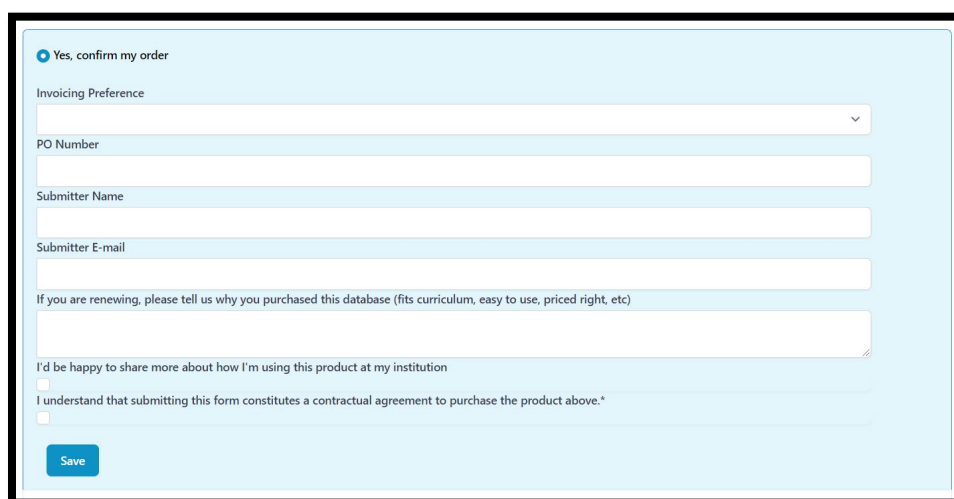
Needs Payment – Subscriptions you have ordered that WiLS has invoiced but payment is not yet received.

History – Past subscriptions that have been invoiced and paid, as well as any subscriptions that were not ordered/renewed.

For all tabs, PDFs of each individual subscription can be downloaded by clicking on the download icon to the right of the subscription name.

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. You can sort the list of subscriptions by Start Date or by Vendor Name.
 - a. For K12 organizations, 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.



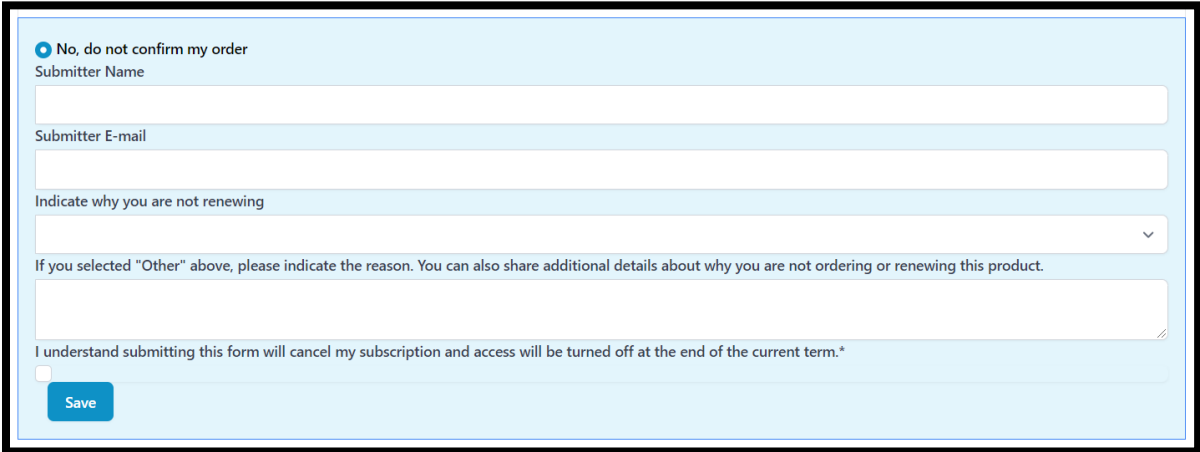
4. Choose your Invoicing Preference from those listed.

- 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. These fields are automatically filled in based on the logged in user's name/email address on file, but can be changed if needed.
 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 or other participants in WiLS' Cooperative Purchasing program, 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 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: Submitting a Decision to Not Order or Renew

1. In the **Subscriptions** section, click on the **Needs Approval** tab.
2. Find the subscription you do not wish to order/renew. 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.

A screenshot of a web form titled "No, do not confirm my order". The form has a light blue header with the title and a radio button. Below the header are three input fields: "Submitter Name", "Submitter E-mail", and "Indicate why you are not renewing". The "Indicate why you are not renewing" field is a dropdown menu. Below the dropdown is a text box with a placeholder message: "If you selected 'Other' above, please indicate the reason. You can also share additional details about why you are not ordering or renewing this product." At the bottom of the form is a checkbox with the text "I understand submitting this form will cancel my subscription and access will be turned off at the end of the current term.*" and a "Save" button.

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. These fields are automatically filled in based on the logged in user's name/email address on file, but can be changed if needed.
5. You must enter a reason for not ordering/renewing in the text box. Cost 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 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. 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.

A screenshot of a web form. At the top, it says "Enter PO Number" in a small, bold font. Below this is a large, empty rectangular text input field. At the bottom left of the form is a blue button with the word "Save" in white text.

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 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!

FAQs

I already ordered something. When will I be invoiced?

Navigate 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 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.