

How
to
Set up

myKaplan
Platinum
Account



Set Up Request Form

Review account for set up (is the account already set up for myKaplan)

If YES make review and action accordingly with presented request

If NO follow set up steps
Make sure to have the set up request form completed

*Sign up for your
My Kaplan Online Ordering Portal*

To sign up for your personalized My Kaplan account, please email this information to info@kaplanco.com or Fax to 1-800-452-7526.

Organization/BILL TO Name _____
Primary Contact (First/Last Name) _____
Phone # _____ Email _____
Bill to / Approver Preferred User Name _____ (4-20 characters)
Bill to / Approver Preferred Password _____ (6-12 characters)
Bill To Customer # _____ (if known)
Billing Address _____

SHIP TO Contact Information
Ship to Customer # _____ (if known)
Shipping Address _____
Ship to Contact (First/Last Name) _____
Phone # _____ Email _____
Ship to / Submitter Preferred User Name _____ (4-20 characters)
Ship to / Submitter Preferred Password _____ (6-12 characters)

Enter "Ship To" information below. Note: If requesting multiple shipping locations, please provide excel file with column formatting as presented below"

Ship to Name	Complete Address	Telephone #	Person placing the order	E-mail address	Preferred username	Preferred password

(Attach additional ship to addresses as needed with contact information)

- Is a Purchase Order Number required? Yes ____ or No ____
- Will the organization require an approval process? Yes ____ or No ____
If yes, what is the dollar amount for approval _____, and who will approve orders for this ship to?
- Does your organization have a logo? If yes, attach a copy in a jpeg or gif format to personalize the website.

KAPLAN
EARLY LEARNING COMPANY

myKapan Set up

Main Menu
Customers
Customer Information
General Information

Bill to Cust#

Click the General Info Links dropdown arrow and select Additional General Info

Standard ID Qualifier = Web Customer

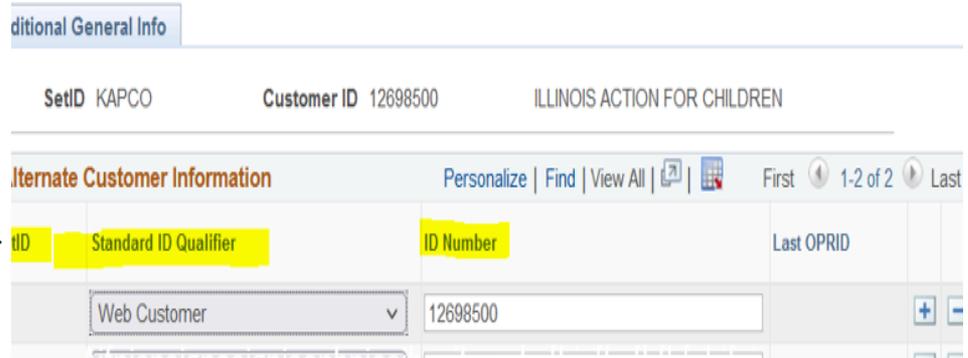
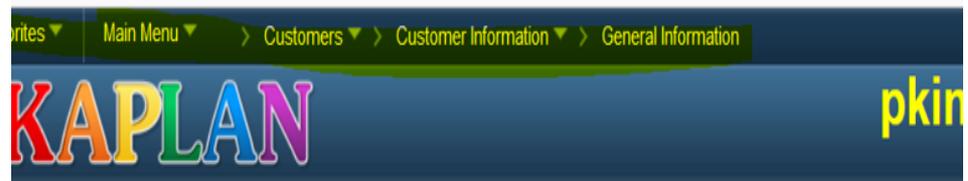
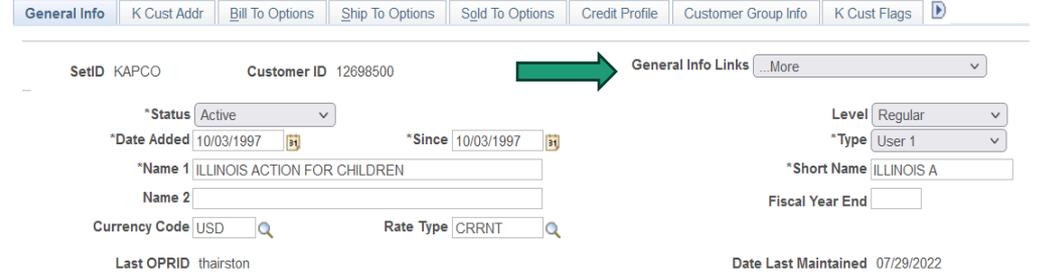
ID Number = "always bill to cust#"

Ship to Cust# (if different from bill to cust#)

Click the General Info Links dropdown arrow and select Additional General Info

Standard ID Qualifier = Web Customer

ID Number = "always bill to cust#"



Tie all ship to Customer# to the bill to
“Complete this step if the ship to customer# is different from the bill to customer# “

- Main Menu
- Customers
- Customer Information
- General Information
- Click Sold To Customer
- Click the + and enter the ship to customer number(s)
- Save

KAPLAN pking - PSPROJ

General Info | K Cust Addr | **Bill To Options** | Ship To Options | Sgld To Options | Credit Profile | Customer Group Info | K Cust Flags

SetID KAPCO Customer ID 12698500 General Info Links [More](#)

*Status Active *Date Added 10/03/1997 *Since 10/03/1997 Level Regular *Type User 1 *Short Name ILLINOIS A Fiscal Year End
 Name 1 ILLINOIS ACTION FOR CHILDREN Name 2
 Currency Code USD Rate Type CRRNT
 Last OPRID thairston Date Last Maintained 07/29/2022

Roles

- Bill To Customer
- Bill To Selection
- Ship To Customer
- Sold To Customer
- Sold To Selection
- Broker Customer
- Indirect Customer
- Correspondence Customer
- Remit From Customer
- Corporate Customer
- Consolidation Customer

Consolidation Business Unit

Federal Attributes

KAPLAN

K Cust Addr | Sgld To Options | **Sold To Selection** | Credit Profile | Customer Group Info | K Cust Flags | Not

SetID KAPCO Customer ID 12698500 ILLINOIS ACTION FOR CHILDREN

Sold To Customer Broker Customer

Bill To Customers Personalize | Find | View All | 1 of 1 | First | Last

*Bill To ID	Sold To Priority		
12698500	1	+	-

Ship To Customers Personalize | Find | View 100 | 1-5 of 2422 | First | Last

*Ship To ID	Sold To Priority		
1007900	578	+	-
10091300	555	+	-
10487000	758	+	-
10739800	189	+	-
10891200	343	+	-

Broker Customer *Broker ID

General Info Sold To Options

myKaplan Set up

- Set up account to go to the web

- Main Menu
- Kaplan Product Web Info
- Web Customers
- Click → Add a New Value
- SetID = kapco
- Standard ID Qualifier = Web Customer
- ID Number = Bill to Customer #
- Add

The screenshot shows the myKaplan web interface. At the top, there is a navigation bar with 'Favorites', 'Main Menu', 'Kaplan Product Web Info', and 'Web Customers'. Below the navigation bar is the 'KAPLAN' logo. The main content area is titled 'Web Customers' and contains two buttons: 'Find an Existing Value' and 'Add a New Value'. Below these buttons are four input fields: 'SetID', 'Standard ID Qualifier' (a dropdown menu), 'ID Number', and 'Name 1'. At the bottom of the form is an 'Add' button.

Web Customers

Find an Existing Value Add a New Value

SetID

Standard ID Qualifier

ID Number

Name 1

Add

myKaplan Set up

- Enter contract# (*Buying Agreement*) hit tab on your keyboard. Terms will populate
 - If Purchase Order is required enter (Y) if the account has tier levels (Approvers) do not select (Y) unless the submitter(s) will have access to the PO#. Approvers will add the PO# prior to approval.
-
- Image → enter kaplan_logo
 - Enter welcome text
 - Example of welcome text: Welcome (add customer name) to your Kaplan Early Learning Company website.
 - Enter disclaimer
 - Coupons and promotions are valid on in-stock items only (drop shipped items and backorders are not included). Cannot be combined with any other offer or discounts. Cannot be used on prior purchases or custom-stocked items. Limit one coupon per customer. Products cannot be resold or used for commercial purposes. No cash value. Void where prohibited. Subject to restrictions and change without notice.
 - Save
 - Click Bill to – Ship to
 - Enter bill to customer number and loc#
 - Enter / Add Ship to Customer numbers and loc#'s (click + to add)
 - Save

Web Customers | Bill To - Ship To

Web Customers | Bill To - Ship To

Ship To	ID Num	Addr Num	Address
1 10891200	1	1	STATE OF ILLINOIS CHLD DEV CTR, 160 N LASALLE ST N 201
2 10891200	2	2	STATE OF ILLINOIS CHLD DEV CTR, 160 W NORTH AVE
3 11033300	1	1	MARY CRANE CENTER, 2905 N LEAVITT ST
4 11033300	4	4	MARY CRANE CENTER, 1545 W MORSE AVE
5 11033300	5	5	MARY CRANE CENTER, 316 N PULASKI RD
6 11380908	1	1	KINDERCARE LEARNING CTR, 14632 JOHN HUMPHREY DR
7 11380908	1	1	CHILDRENS WORLD LRNG CTR 0829, 16100 OAK PARK AVE
8 11381002	1	1	KINDERCARE LEARNING CTR, 000367, 1275 JONES RD
9 11381004	1	1	KINDERCARE LEARNING CTR, 2350 BODE RD
10 11381007	1	1	CHILDRENS WORLD LRNG CTR 0697@, 650 W WISE RD

PeopleSoft and Web Entries

- PeopleSoft day end process must complete before Web users can be set up
- Inside.kaplanco.com/admin (go here after day end)

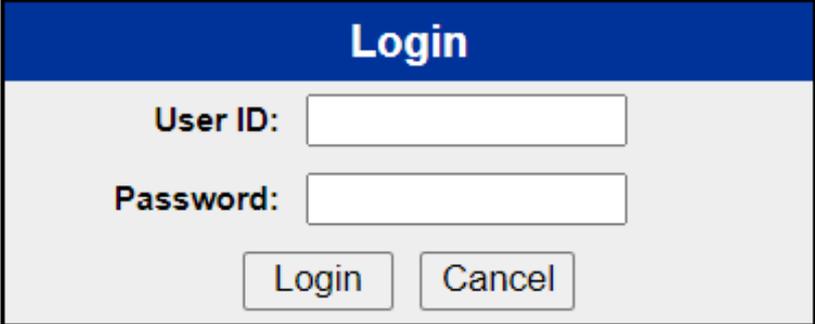
User and Tier Level Set up

Go to:

Inside.kaplanco.com/admin

Login:

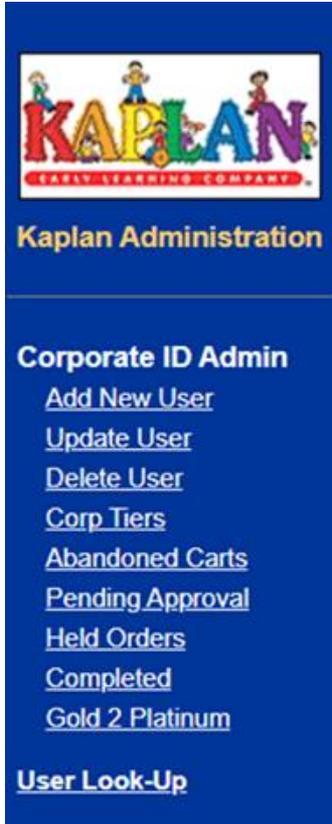
With your Kaplan computer
credentials



The image shows a login form with a blue header bar containing the word "Login" in white. Below the header, there are two input fields: "User ID:" followed by a white text box, and "Password:" followed by a white text box. At the bottom of the form, there are two buttons: "Login" and "Cancel", both with a light gray background and black text.

Adding Users and User Tier Levels

Corporate ID Administration



- Click Add New Users
- Create/Enter Username
- Create/Enter Password
- Corporate Account → click dropdown and select the correct bill to customer

User Name*: (4 - 70 characters)

Password*: (6 - 12 characters)

Confirm Password*: (6 - 12 characters)

Corporate Account*:

*** Required Fields**

Enter User Information:

Name

Telephone #

Email address

Select User access:

- Select Admin Privileges (no) – unless customer will add new users
- Set up new ship to's (no) – unless customer will be adding ship to addresses
- Select Authorization Level
 - Submitter or Approver
- Click Update

Check the Bill to associated with the user

Note: **KaplanOne** allows user to view all orders and invoices on account. For user to access KaplanOne: select (yes) Allow Users to View All Orders and enter bill to customer# allowed to view

Contact Information & Administration Privilege

User Name: pkIAFC
Password*: (6 - 12 characters)
Confirm Password*: (6 - 12 characters)
Corporate Account: ILLINOIS ACTION FOR CHILDREN
First Name*: Paula
Last Name*: King
Phone*: 3367667374 (xxx-xxx-xxxx) Ext:
E-mail Address*: pking@kaplanco.com

User Name Admin Privilege*: Yes No
Allow User to Setup New Addresses*: Yes No
Allow User to View All Orders*: Yes No
Customer Number Allowed to View:

User Order Processing Settings

Authorization Level*:

* Required Fields

User Name: pkIAFC
Corporate Account: ILLINOIS ACTION FOR CHILDREN

User Order Processing Settings

Select appropriate Billing Account(s). (Restricts this Corporate Account user to select from only these specific Billing Account(s))*:

Bill To	Name	Address	City	State
<input checked="" type="checkbox"/>	12698500-1	ILLINOIS ACTION FOR CHILDREN	4753 N BROADWAY ST 1ST FL	CHICAGO IL
		ACCOUNTS PAYABLE		

* Required Fields

Select ship to(s) for each User
 Submitter(s) and Approver(s)

Update

User Name: pkIAFC
Corporate Account: ILLINOIS ACTION FOR CHILDREN

User Order Processing Settings

Select appropriate Shipping Address(es) for each Billing Account. (Restricts this Corporate Account user to select from only these Shipping Address(es))*:

Select Ship To Addresses for Billing Account (126985001)*:

Bill To	Name	Address	City	State
<input checked="" type="checkbox"/> 1007900-1	EVANSTON SKOKIE SCH DIST NO 65	1500 MCDANIEL AVE	EVANSTON	IL
<input checked="" type="checkbox"/> 10091300-1	SOUTH CENTRAL COMMUNITY SERV	8316 S ELLIS AVE	CHICAGO	IL
<input checked="" type="checkbox"/> 10487000-1	TENDER CARE EARLY LEARNING CTR	1901 S 9TH AVE	MAYWOOD	IL
<input checked="" type="checkbox"/> 10739800-1	REBA PLACE DAY NURSERY	740 CUSTER AVE	EVANSTON	IL
<input checked="" type="checkbox"/> 10891200-1	STATE OF ILLINOIS CHLD DEV CTR	160 N LASALLE ST N 201	CHICAGO	IL
<input type="checkbox"/> 10891200-2	STATE OF ILLINOIS CHLD DEV CTR	160 W NORTH AVE LASALLE N201	CHICAGO	IL
<input checked="" type="checkbox"/> 11033300-1	MARY CRANE CENTER	2905 N LEAVITT ST	CHICAGO	IL
<input checked="" type="checkbox"/> 11033300-3	MARY CRANE CTR	1120 N LAMON AVE	CHICAGO	IL
<input checked="" type="checkbox"/> 11033300-4	MARY CRANE CENTER	1545 W MORSE AVE	CHICAGO	IL
<input checked="" type="checkbox"/> 11033300-5	MARY CRANE CENTER	316 N PULASKI RD	CHICAGO	IL
<input checked="" type="checkbox"/> 11380906-1	KINDER CARE LEARNING CTR	14632 JOHN HUMPHREY DR	ORLAND PARK	IL

Final Step

Sales Rep and Customer Communications

- Customer:
 - Email welcome letter/email to customer
 - Forward credentials “username(s) and password(s)”
 - One page overview ordering sheet
 - Share details related to the navigation panel
- Sales Rep
 - myKaplan set up is complete
 - Credentials “username(s) and password(s) have been forwarded to customer
 - One page overview ordering sheet has been forwarded to customer

GSA myKaplan Request

Example of email request:

----- Forwarded message -----

From: info@kaplanco.com

Date: Wednesday, February 26, 2025,
10:05:09 PM -0500

Subject: GSA myKaplan Request

To: bids@kaplanco.com,
gsa@kaplanco.com

FName*: Kimberly

LName*: McClure

Title*: T&C Specialist

**Program*: Navy Child & Youth
Programs**

Address*: PSC 473 Box 60

Address2:

Address3:

City*: FPO

State*: AP

Zip*: 96349

Country: USA

Phone*: 315-243-3439

PhoneExt:

Fax:

Email*:

kimberly.m.mcclure3.naf@us.navy.mil

Set up Steps

Obtain customer number for the address noted on the customer's email. *If not available forward email to COS that includes the customers address to obtain the customer number to use.*

This is the customer to use as bill to and ship to in Psoft web customer's panel

- In PS, under General Information, tie the customer number to the GSA C# 687400
- In PS, under the Web Customer Panel, go to the GSA C# 687400 and ties the customer number you located or provided by COS that matches the customer address on email. Add this customer number as a bill to and ship to address for ID Number 687400. . **This will process overnight.**
- The next day, you can setup the username & password in
- KapAdmin.
- Share credentials "username & password" with customer

Procurement Punchout Request

What you should do?

– **CXML** → Jon Travis

- cXML (commerce eXtensible Markup Language) which is used to store, transmit, and reconstruct data.

– **Skyward** → Jon Travis

- software solutions for K-12 schools and municipalities

– **Punch-Out** → Jon Travis

- integrated e-procurement system that enables suppliers to promote goods and services to buyers by providing access to the catalog via the vendor's website interface

1. Forward the following to Jon Travis
Customers request
Bill to Customer #
Customer Contact Information
2. Set account up to go to the web
Follow the myKaplan set up steps
 - Customer Information General panel
 - Web Customer Panels
 - Stop
 - Do Not add any users in KapAdmin