Using and Creating Favorites

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This tutorial will review how to create and use "Favorites" in Shop@UW, including:

- How to navigate to the "View Favorites" link.
- Managing the Favorites personal folders.
- Adding items to Favorites and
- Using Favorites to order items.

Favorites are a list of products, similar to a shopping list, that are frequently ordered from hosted supplier catalogs. They provide the shopper with quick access to those items.

The favorites functionality is only available from those suppliers listed in the "Shop at a Hosted Supplier Catalog" Showcase. Items from a punch-out site cannot be added to favorites; however, search and favorite functions are usually available directly on the vendor punch-out sites.

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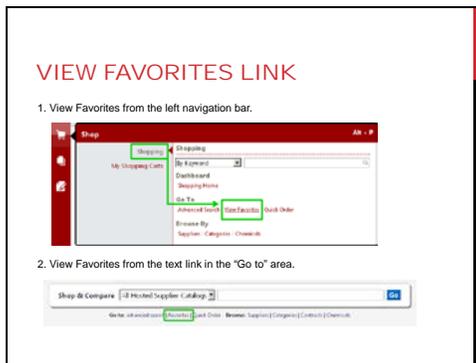
There are two ways to navigate to a shopper's list of favorites.

- From the Left Navigation Bar, click the "Shop" fly out menu. Click the "View Favorites" link located under the "Shopping" link.

- On the main Home/Shop page, under the Shop & Compare search, click the Favorites link in the "Go to" area.
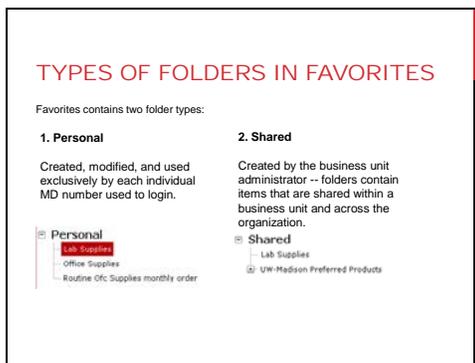
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FAVORITES WINDOW

Two areas in the Favorites window.

- Manage folders on the left.
- Folder contents are displayed on the right.

Once either of the links is clicked, the shopper will notice that the Favorites window is split into two areas.

- The area on the left side of the screen is where the folders are managed.

- The window on the right side of the screen displays the folder contents.

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TYPES OF FOLDERS IN FAVORITES

Favorites contains two folder types:

1. Personal

Created, modified, and used exclusively by each individual MD number used to login.

2. Shared

Created by the business unit administrator -- folders contain items that are shared within a business unit and across the organization.

Personal
- Lab Supplies
- Office Supplies
- Routine Ofc Supplies monthly order

Shared
- Lab Supplies
- UW-Madison Preferred Products

On the left-hand portion of the favorites screen, users will see two folder types.

- The first is Personal folders. Each MD number can create, modify and use their own personal favorites folders. Personal folders are specific to each individual MD number used to login.

- Shared folders are created by the administrator and allow favorites folders to be made that share items across the organization, department, or group of users.
  - For example, the UW-Madison Preferred Products are shared favorites.

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MANAGING THE FAVORITES FOLDER

Four buttons that manage the Favorites folder:
- New
- Edit
- Move/Copy
- Delete

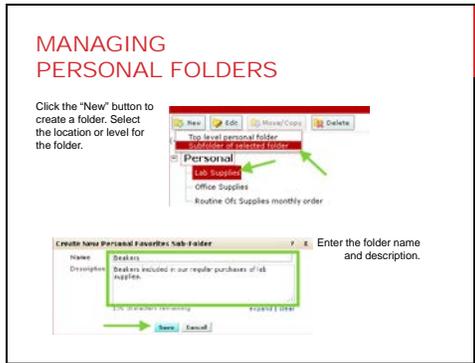New | Edit | Move/Copy | Delete

At the top of the Favorites window on the left are four buttons that allow the user to manage their favorites folders. They are:
- New,
- Edit,
- Move/Copy, and
- Delete

These functions will be covered in the following screens.

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The 'New' button allows the shopper to create a new folder or sub-folder. To create a new folder:

- Click on "New."
  - ➢ Select the "Top level personal folder" for sub-folders under "Personal."

- Highlight an existing folder where the sub-folder is to be created
  - ➢ Click on "New."
  - ➢ Select the "Subfolder of Selected Folder" option to place the entry under the highlighted folder.

- Add a folder name and optional description in the appropriate fields.

- Click "Save."

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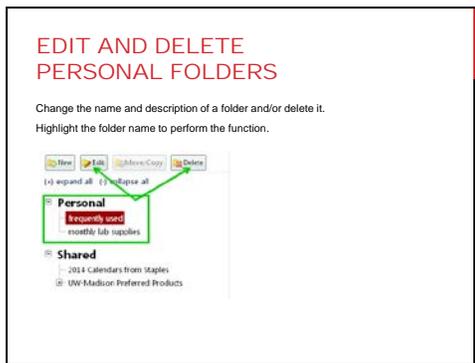
Once this sub-folder is created, it may be edited or deleted.

- Click on the folder name to highlight it.
- The edit button allows the shopper to change the name and description.
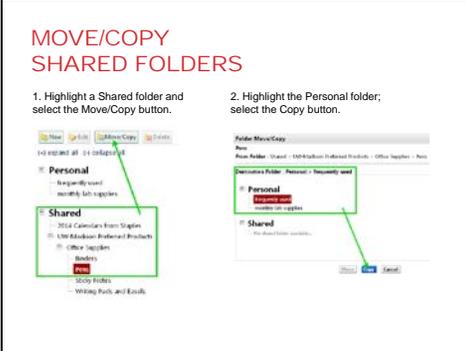- The delete button allows the shopper to delete the folder.

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Shared folders, that are assigned the copy permission by the administrator, may be copied to personal folders.

- Highlight the Shared folder.
  - Click on the Move/Copy button.

- Select the desired personal folder.
  - Click the Copy button.

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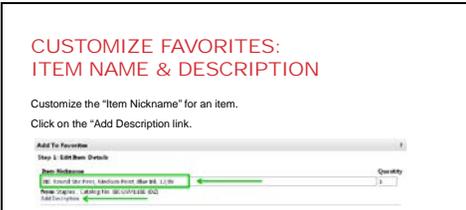There are two ways to add items to a shopper's personal favorites folder.

The first method, described below, is to add items to personal favorites while reviewing the results of a search in Shop@UW.

- To practice, use the Shop & Compare field to search for a "5ml beaker".
- Click the "add favorite" link under the "Add to Cart" button when this is an item that will be ordered frequently.
- Highlight the desired personal folder in the window that opens.
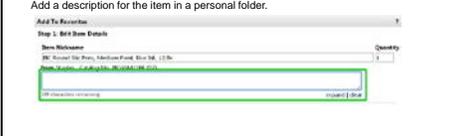- Click on the "Submit" button to save the item in a personal folder.

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After the "add favorite" link is clicked, the "Add to Favorites" window opens.
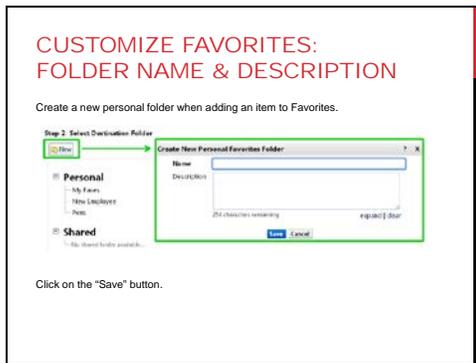
See Step 1:

- Enter an Item Nickname.
  - ➢ When saving a favorite, the name can be changed to anything that will help the shopper to better identify or remember the item.
  - ➢ This name will also appear in search results for the MD number that was used to create the favorite.
- Update the description, if desired, before the item gets saved to a favorites folder. Delete the original text and type in something more meaningful.

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Note that the customized nickname and description in the Favorites personal folders are only meant to help the shopper identify items and will not be sent to the supplier. The original description will still be sent to the supplier and added to the shopper's cart.

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CUSTOMIZE FAVORITES: FOLDER NAME & DESCRIPTION

Create a new personal folder when adding an item to Favorites.

Step 2: Select Destination Folder

Create New Personal Favorites Folder

Personal
- My Favs
- New Employee
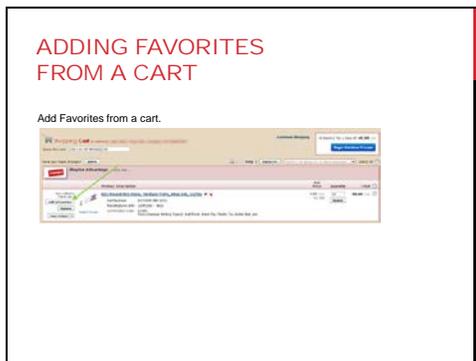- Pens

Shared

Click on the "Save" button.

If the desired folder for the favorite does not already exist, the shopper can create a new personal folder when adding an item to Favorites.

See Step 2 in the "Add to Favorites" window that opens:

- Select New and then Top Level Personal Folder.
- Another window opens where the folder name and description (optional) can be entered.
- Click on the "Save" button.

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ADDING FAVORITES FROM A CART

Add Favorites from a cart.

The second way to add items to a personal favorites folder is directly from the cart.

- Click on a cart.
- Click on the "Add to Favorites" button to the left of the item.
- The rest of the steps to add the favorite are the same as those steps outlined in the "Adding Items to Favorites from Search Results" instructions.

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Once favorites have been created, the shopper can use the favorites folders to order items. To use an entire folder to place an order:

- Select the folder that was prepared to order from.
- At the top of the favorites list, select the check box.
- Click the 'add to cart link' to the left of the check box.

Items in the folder can also be ordered individually, if desired, by clicking the Add to Cart button for the specific item.

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This concludes the tutorial on Using and Creating Favorites. A number of other tutorials for important Shop@UW functions are available to review on the tutorial index web page found at http://www.bussvc.wisc.edu/shopuw/tutorials.html .

Questions about Shop@UW can be forwarded to customer service at shopuw@bussvc.wisc.edu .