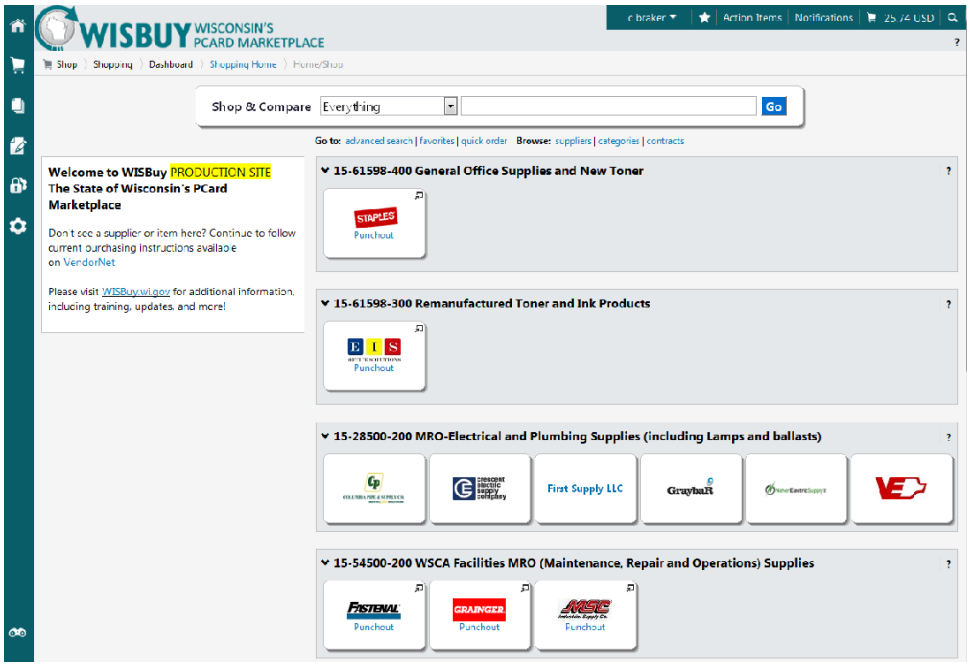
Once Your Account is Set-up, What's Next?

Step 1: Once your account is set up and you have a **User Name** and **Password**, you will need to login at:
https://solutions.sciquest.com/org/WisconsinMarketPlace

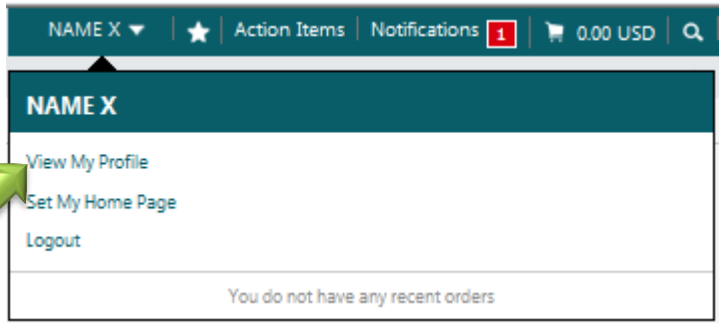
Step 2: Once logged in, you will be brought to WISBuy's Homepage shown below.



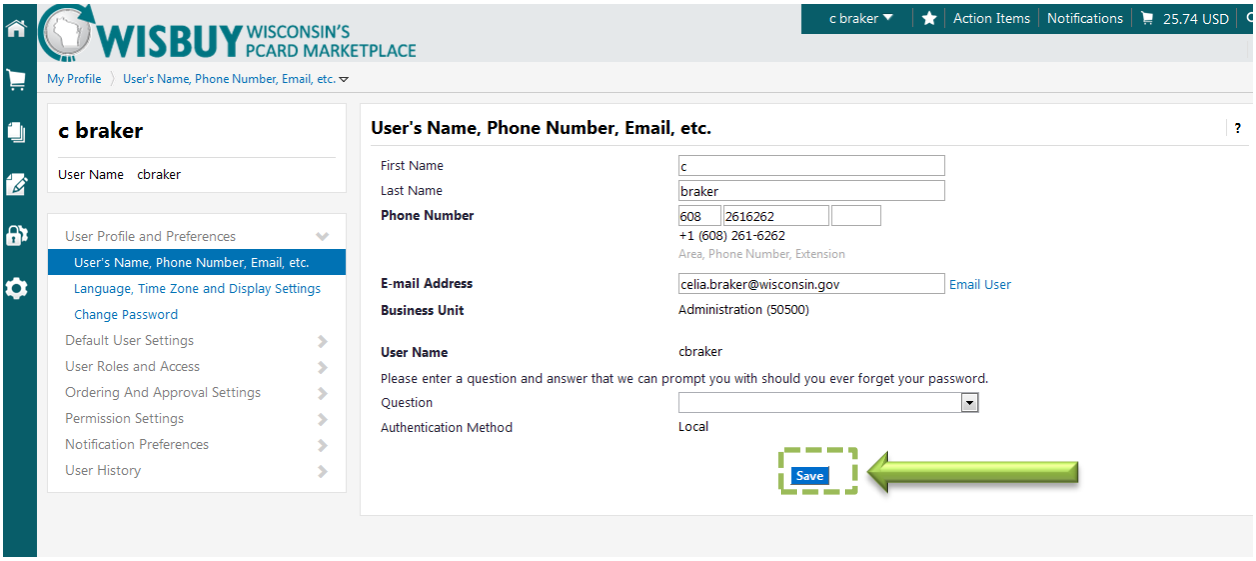
Step 3: In the top right corner you will see your User Name

, click on your name and a drop box with options will be displayed.

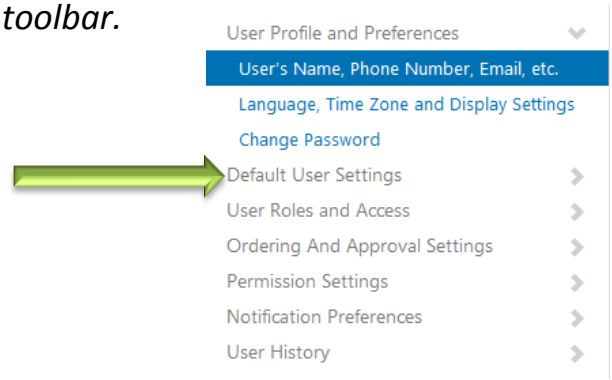
Step 4: Go to **View My Profile**



Step 5: You will be brought to your active profile where you can view or edit your user username, phone number, email address, and security question. After reviewed click on the "Save" Button at the bottom of the screen.

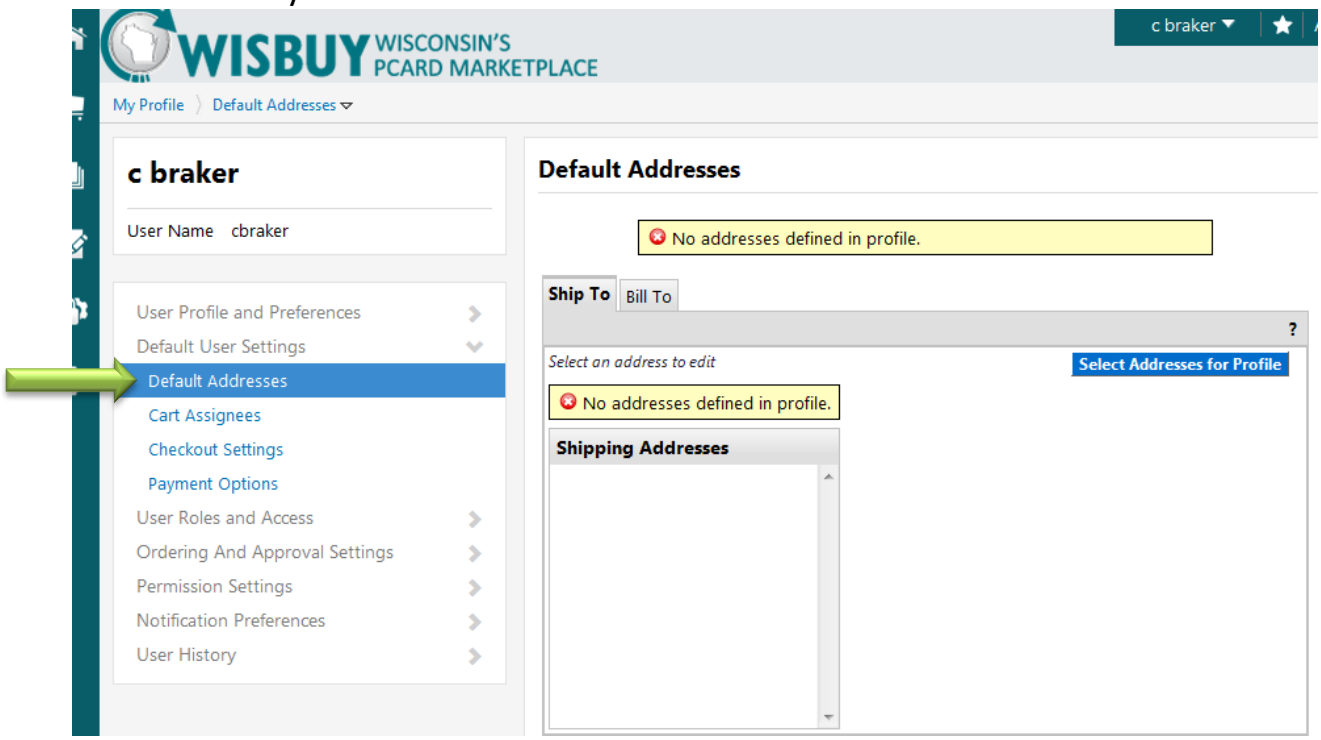


*NOTE: There are two required fields when making a purchase **1) Shipping Address** and **2) P-card Number**. If you would like to set up a default Address/p-card number you can do so by clicking on the "**Default User Setting**" link on the left-hand side toolbar.*

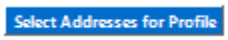


Setting up Your Default Address

Step 1: After you click on the *"**Default User Settings**"* link, you will be brought to a screen where you can select "**Default Addresses**."

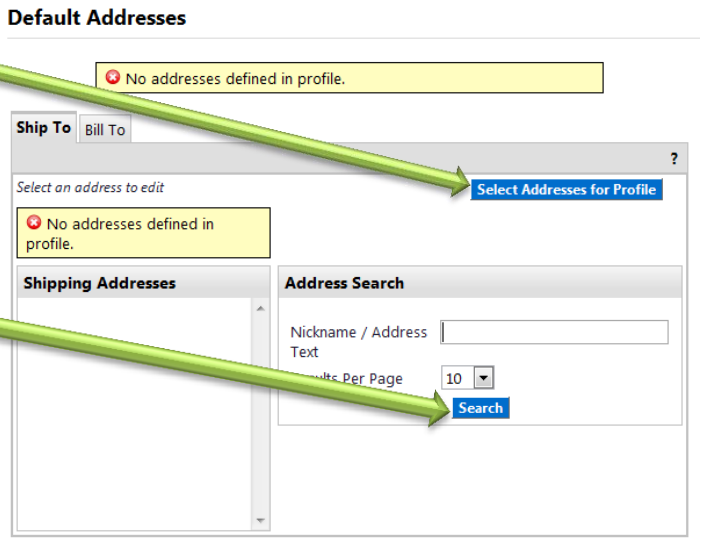


Step 2: Once on the Default Address Screen, click on

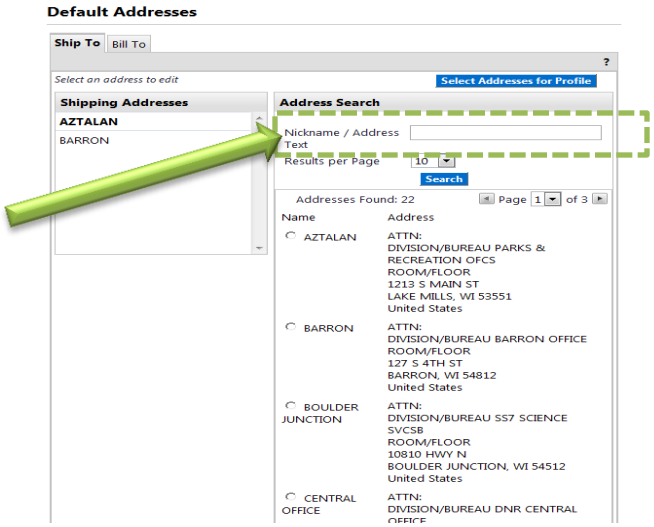


Button and it will bring up a "**Address Search**" box.

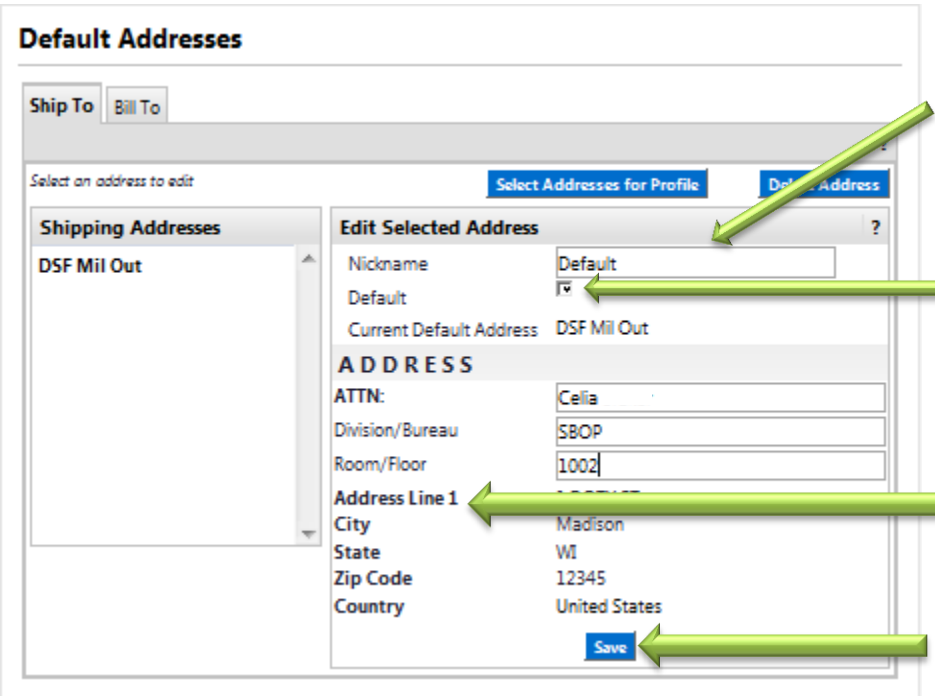
Step 3: Leave the **"Nickname/Address Text" field blank** and click on the "**Search**" button and your pre-set addresses will be displayed.



To further filter through the list of addresses, try entering the street number (i.e “5503”) in the **“Nickname/Address Text”** field and click **search** again. You may need to click on the **next arrow** to search all result pages.



Step 4: Choose an option and more information will be displayed where you can edit the building/room number and set it as your default by checking the “**Default**” box and then clicking on the Save button when you are complete.



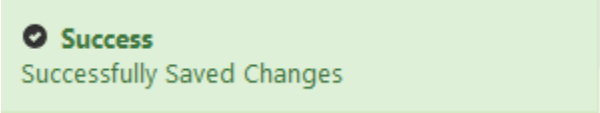
Please **do not edit** your address **nickname** as it may cause complications with some suppliers.

Make sure “Default” is marked in order to save this address as your default address.

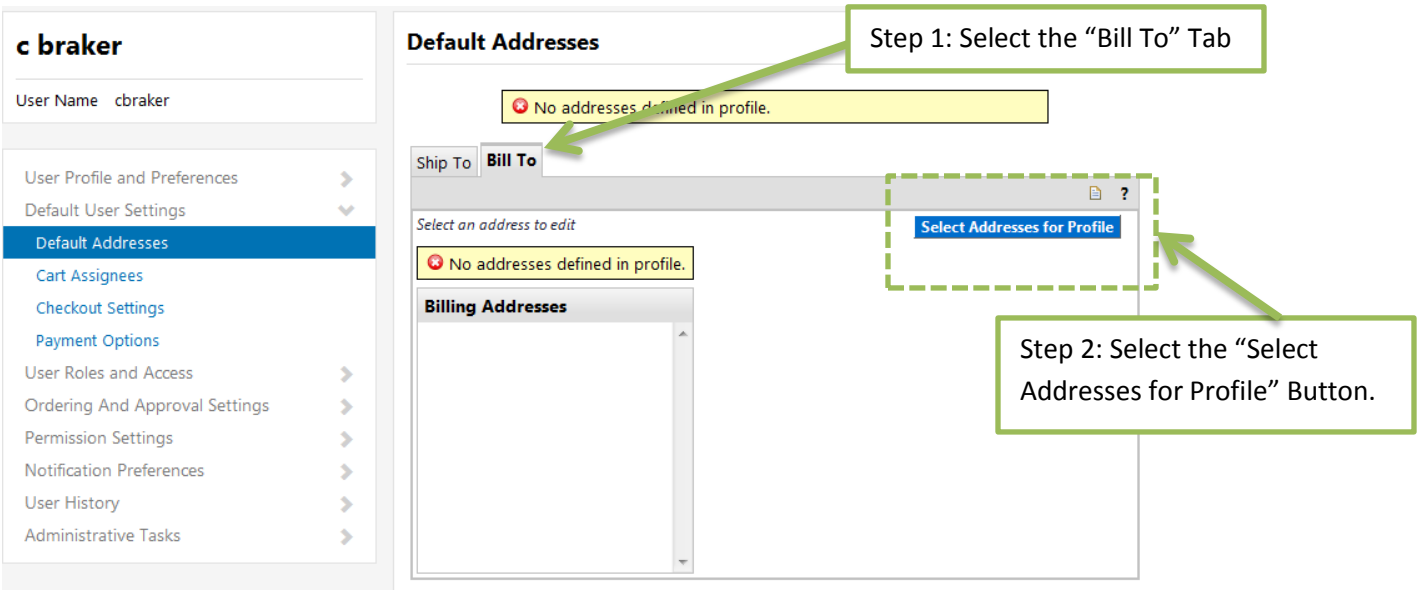
Notice the required items will be **bolded**.

Make sure to save your changes!

NOTE: Once you hit save, you will see that your changes were saved with notification at the top of your screen. This address can be edited at any time, and if you have a different shipping address for a specific purchase you may enter that when you checkout that particular purchase.

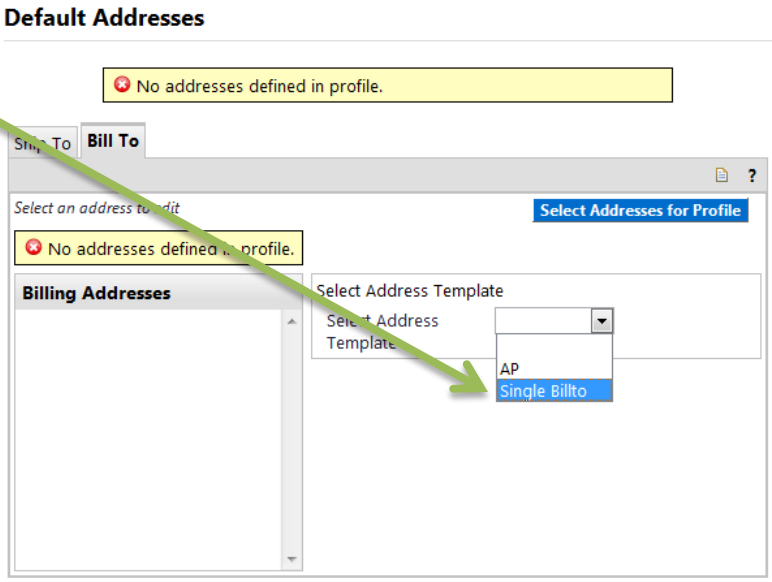


Next, set up your "**Bill To**" placeholder by selecting the "**Bill To**" tab:



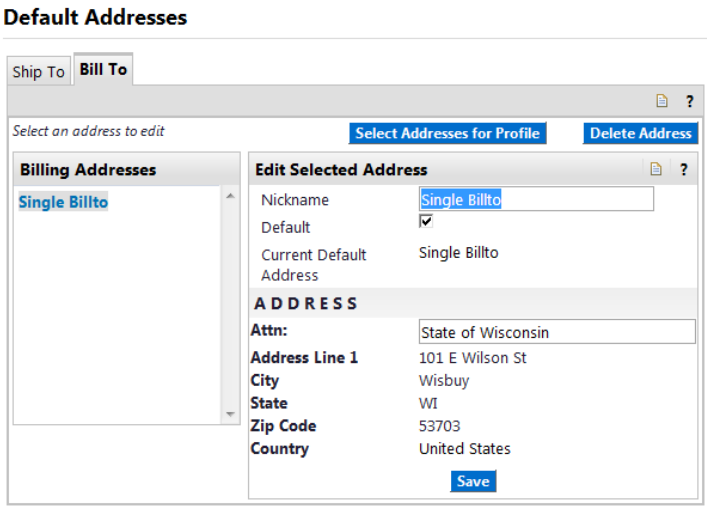
NOTE: "**Bill To**" addresses are <u>automatically linked</u> to the end-user's P-card account and just needs to be defaulted to the "**Single Billto.**" The space for "**Bill To**" on WISBuy is just a placeholder for the account and can be set up to link to your pcard number by selecting the "**Select Addresses for Profile"** button on the left-hand side.

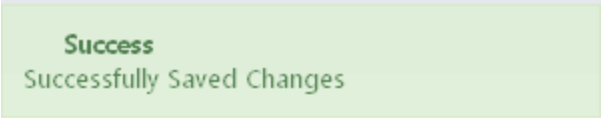
THIS WILL NOT BE WHAT A PCARD USER IS USED TO SEEING AS A "BILL TO" ADDRESS.



A Drop down box will appear, select "**Single Billto.**"

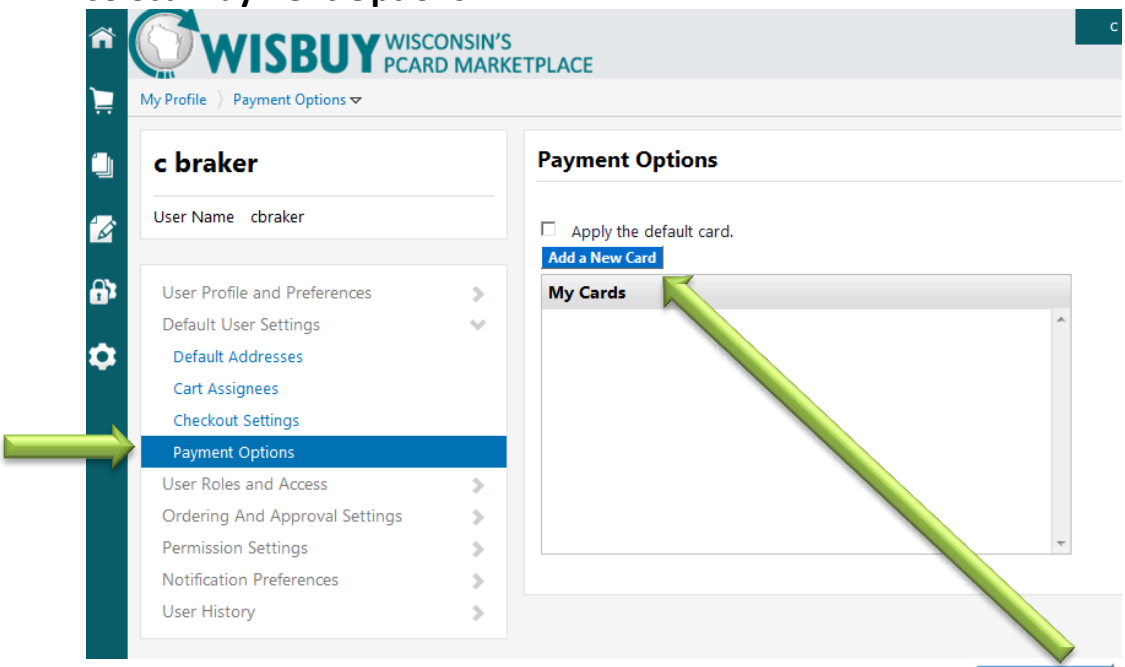
Information will auto fill with the default box checked. Click on the "**Save"** button on the bottom of your screen to make sure that your billing placeholder is set up for the system to allow ease of purchasing.

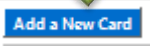




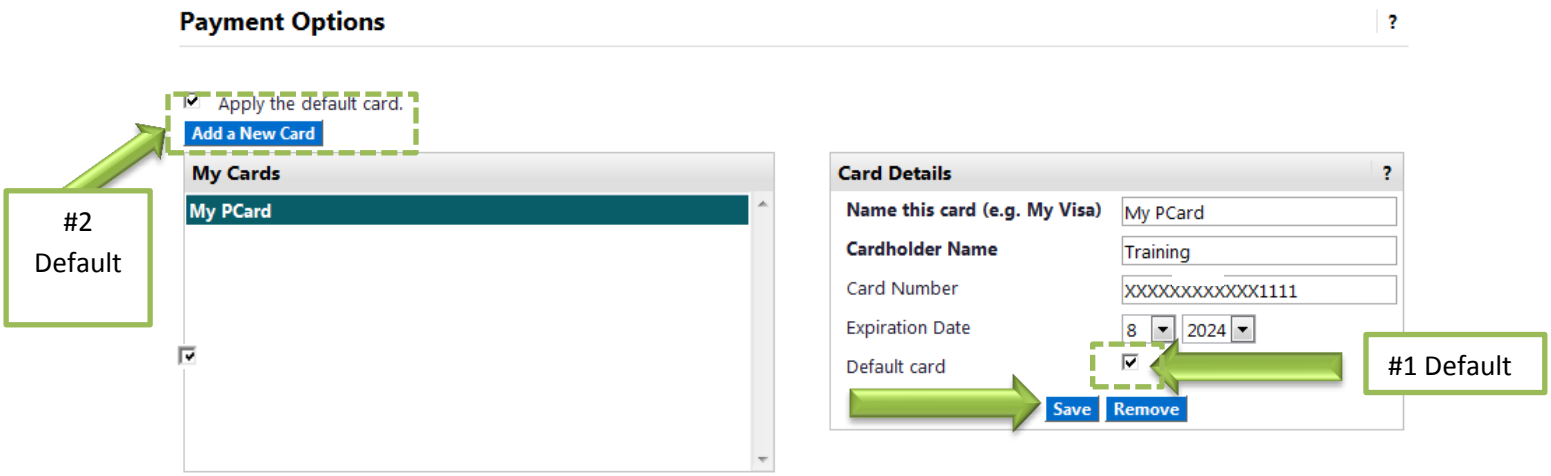
<u>Setting up Your Default P-Card Number</u>

Step 1: Under the "***Default User Settings***" link on the left-hand side tool bar, select "**Payment Options**."

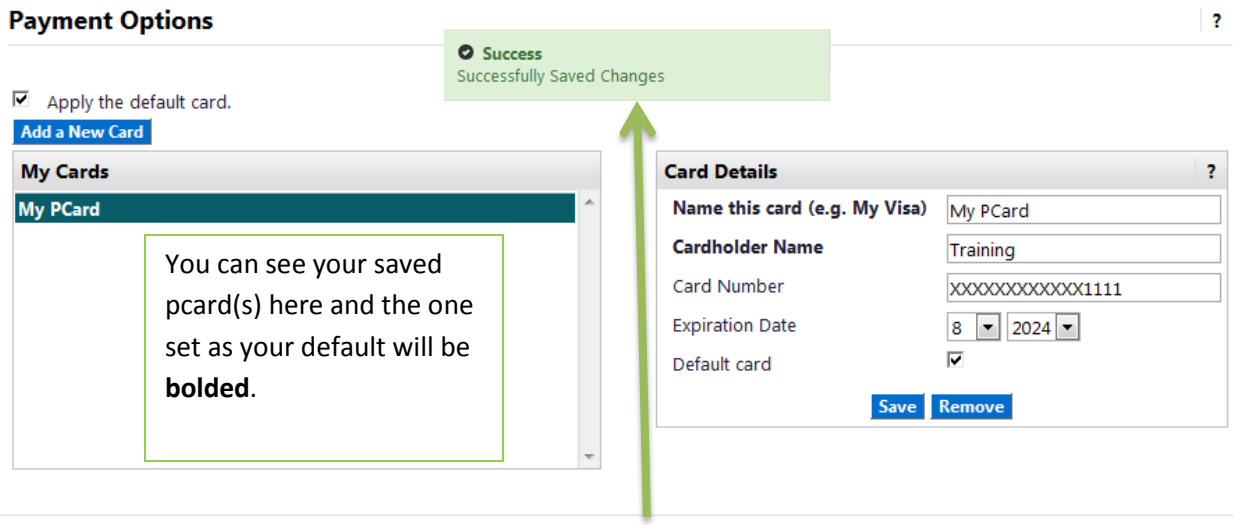


Step 2: Once on the Payment Options Screen, Click on the 

Button.



Step 3: Once you click on the Add a New Card Button, a **Card Details** box will be displayed. If you would like this card to be your default card make sure that the "**Default Card**" box is checked in both places indicated above. Fill out the box and click on the Save Button.



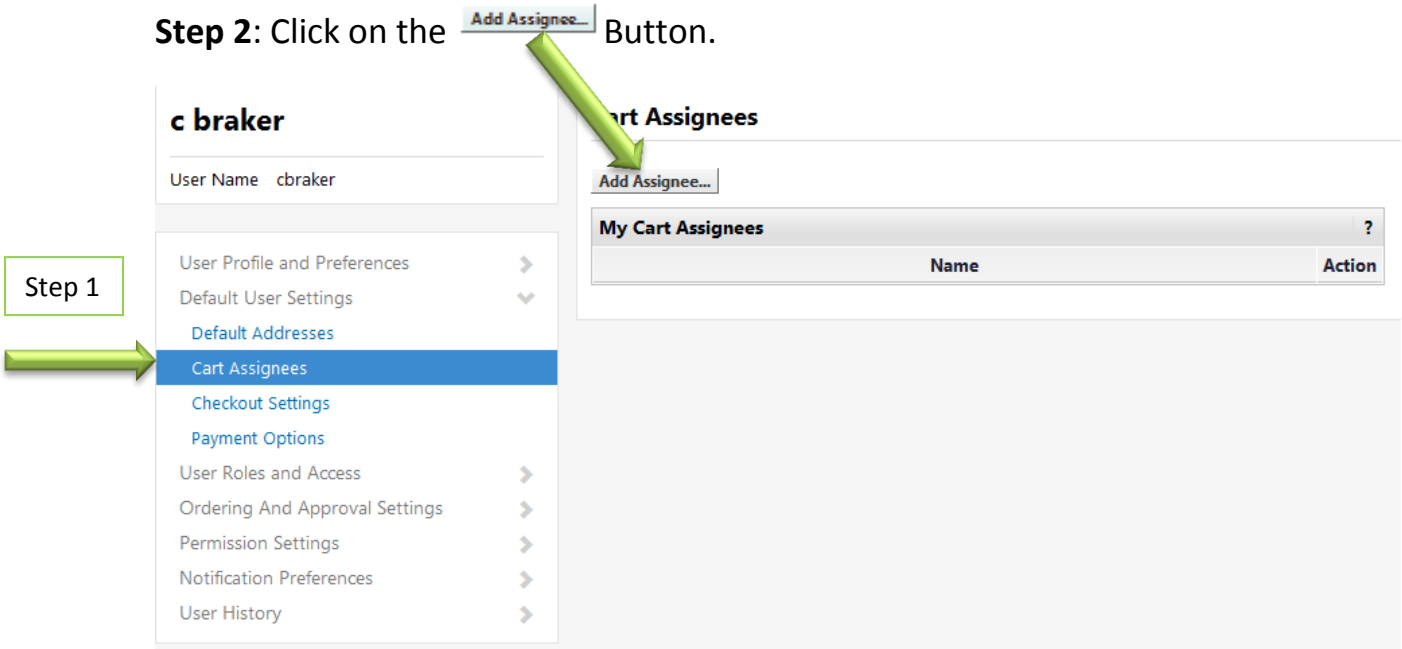
NOTE: Once you save, you will be notified at the top of the screen.

If you have <u>more than one p-card</u> that you make purchases with you can go ahead and Click on the Add a New Card *Button and repeat the **Card Details** section above. You <u>will not</u> need to set this as your default card since you already pre-set your default card (you can always go back and change your default card at anytime). When you have more than one card you will see the "**Name this card**" that you created listed on the box on the left under "**My Cards**."*

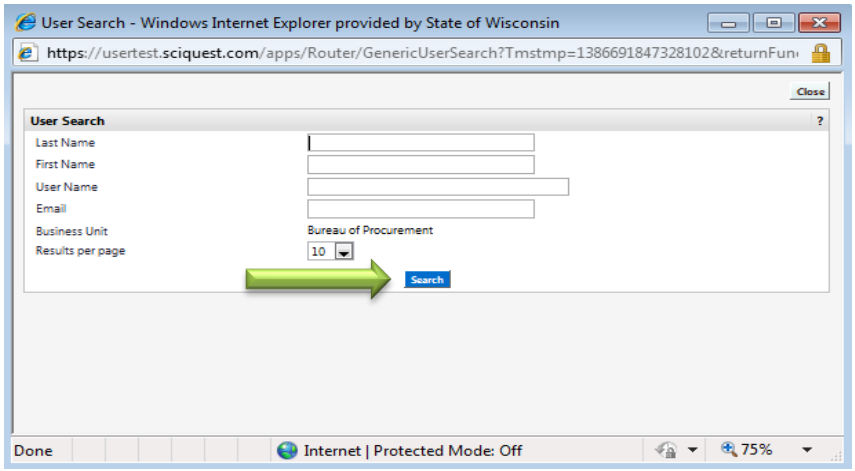
Don't have a p-card and need to make a purchase?

Step 1: If you are authorized to set-up a pruchase, but do not have a p-card number assigned to you, you can go to the **Cart Assignees** section in the "***Default User Settings***" link. This way when you finish a purchase, the assignee will already be set and it will make a faster shopping experience if you assign the cart to the same person frequently.

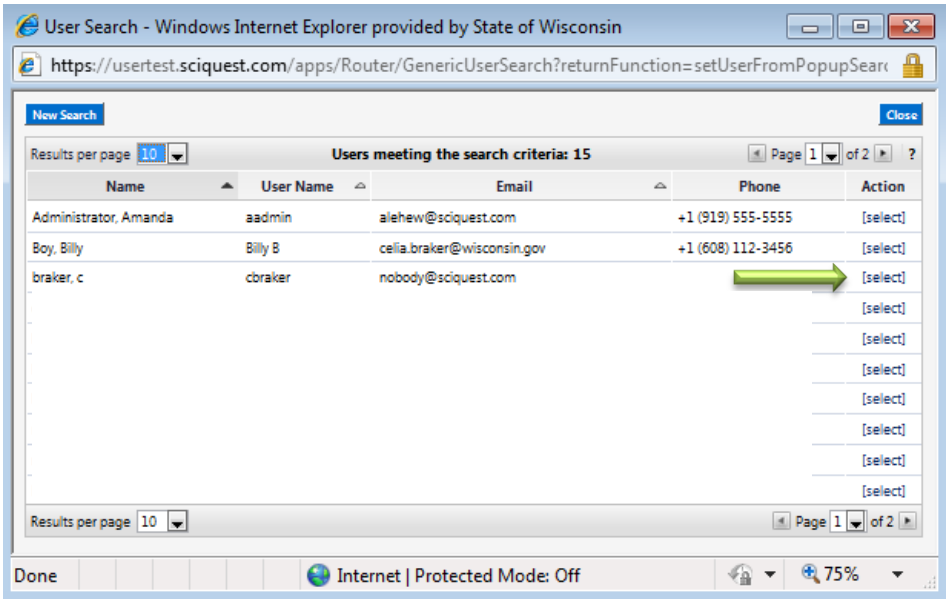
Step 2: Click on the Add Assignee... Button.



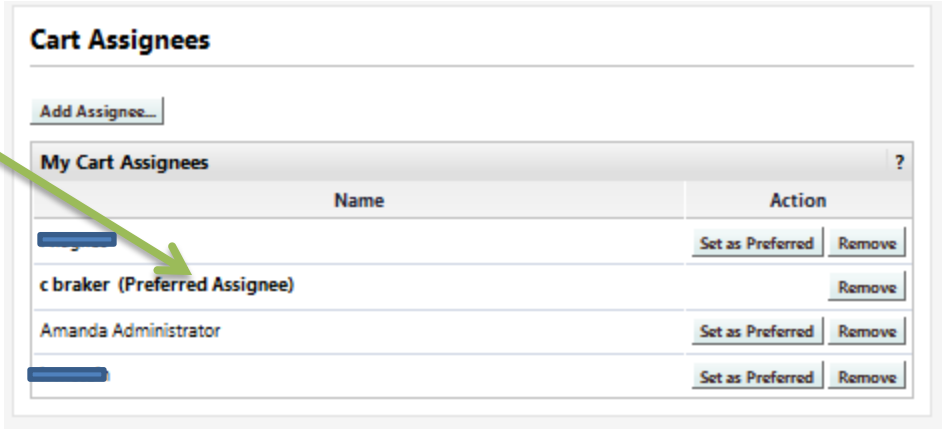
Step 3: The below box will pop up to see all possible staff that you can assign a cart to, just click on the Search Button and it will bring up all possible options.



Step 4: In the Action Column on the right, click on [select] and the person will appear on your "**My Cart Assignees**" list below.



You can also set a specific individual as a **Preferred Assignee** (most likely the one that you will be assigning most of your purchases to).



This concludes the lesson on what's next in WISBuy. For further assistance, please contact WisBuy@Wisconsin.gov or visit the website.