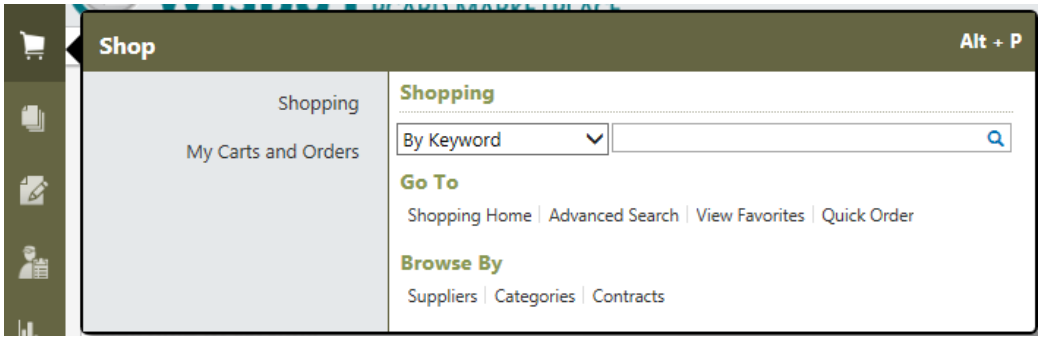
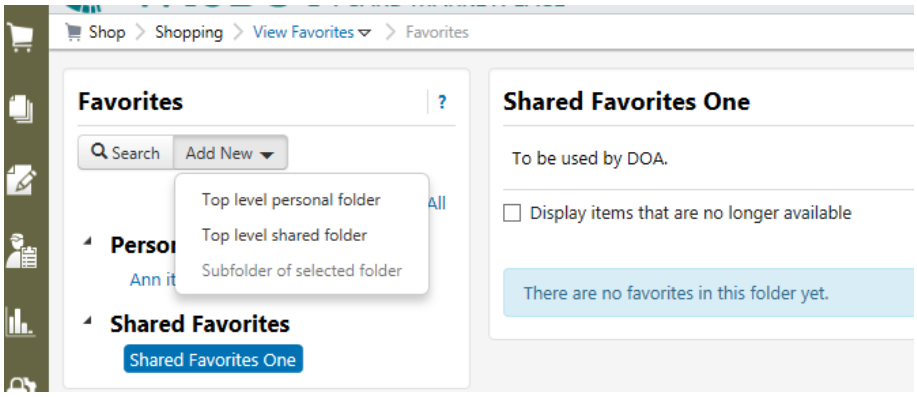
Admin-Creating BU Shared Favorites

In the PCard Marketplace BU Admins can create Shared Favorites lists for their business unit. BU Admins can also limit who can see the Shared Favorites list within their agency. Favorites are commonly or preferred items from Hosted Catalogs. This guide will go through the steps to create a shared list.

1. The Favorites screen can be accesses in two different ways:
    a. Under the Shop & Compare bar there is a favorites hyperlink.
    b. Click on the shopping cart icon in the left navigation menu, and then click the View Favorites link.



2. To create a new shared favorite folder, click on the Add New button.



3. Select the Top level shared folder.

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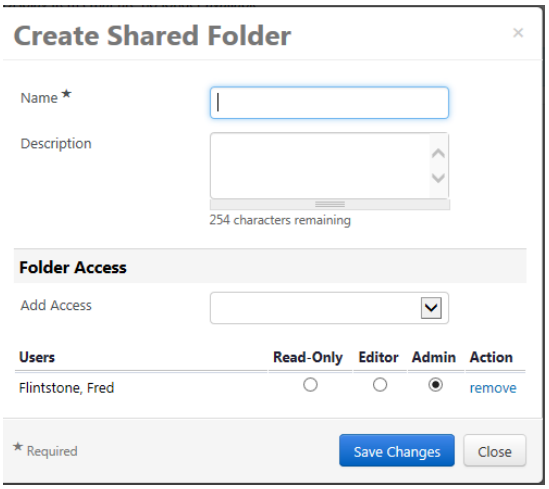
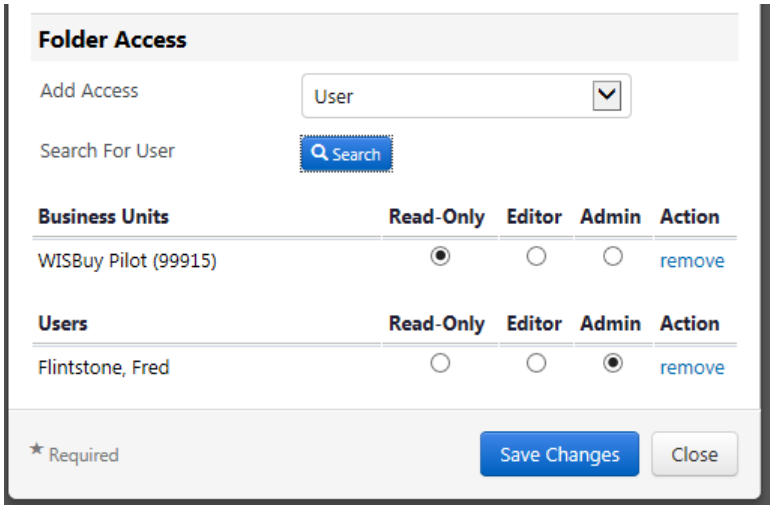
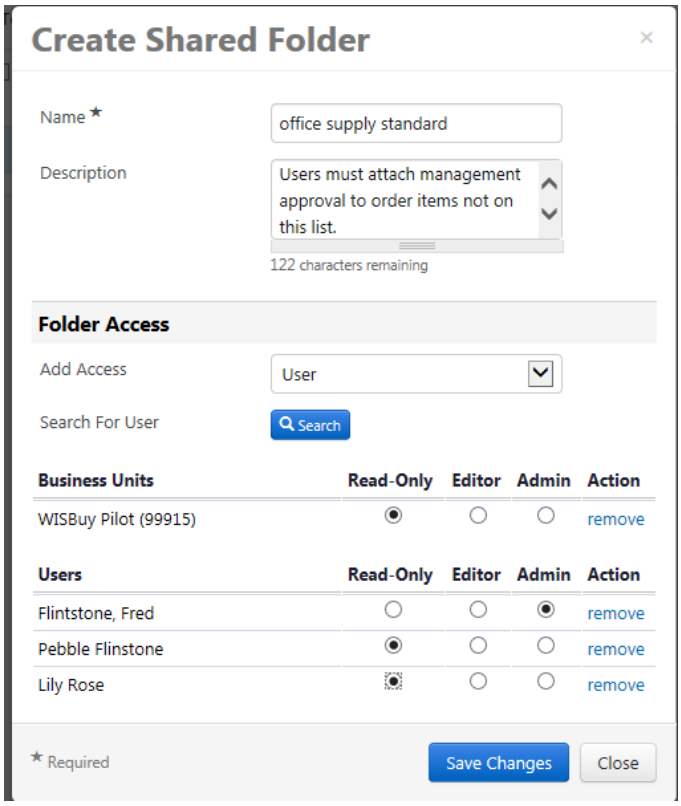


4. Fill in the information for this shared folder.
    a. Name the folder,
    b. Enter a description for the folder,
    c. In the Add Access drop down select;
        i. Business Unit for all users to see
        ii. Role if users with role should only see
        iii. User if there are only certain user that should see the folder

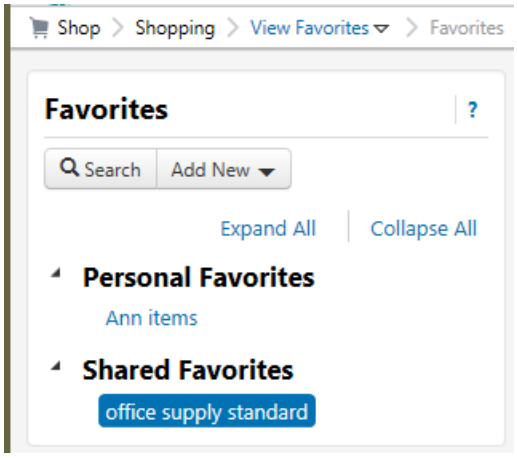
Note: *Depending on the role selected, the next box will then reflect the users that can be added.*



    d. Select User for Add Access, click the search button to find the users that can use this favorite.

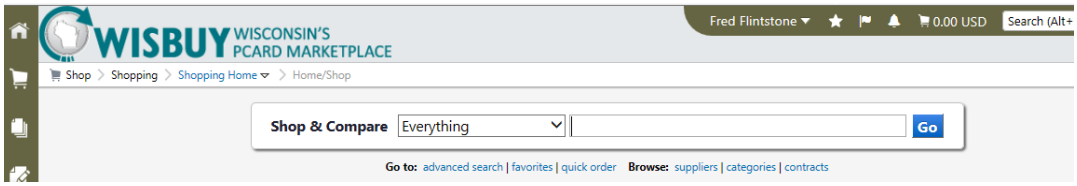


e. Select the type of access for each user Read-Only or Editor
f. Once all the fields are selected then click the Save Changes button.
g. The new folder will show in the Shared Favorites list.



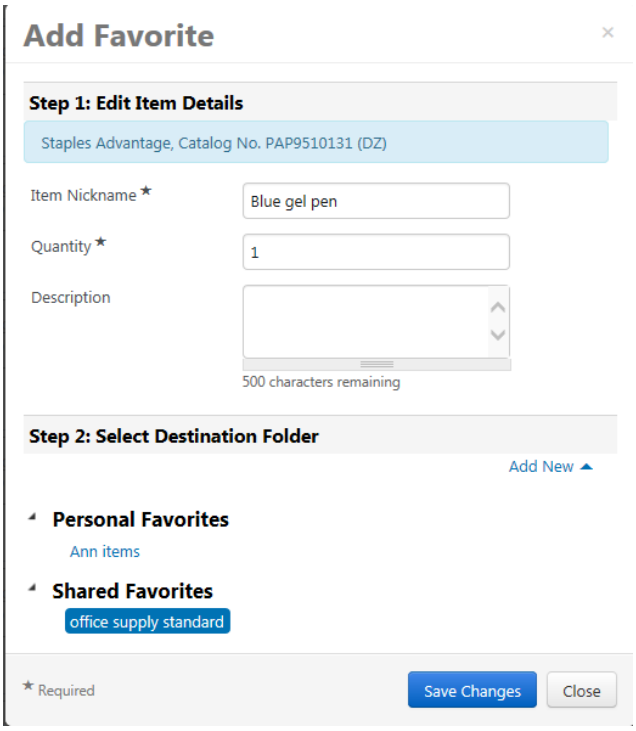
Adding items to the shared folder

5. Items can now be added to the folder by searching for products. Click on the WISBuy Banner or Home Icon to return to the shopping home page.



6. Using the Shop & Compare bar, search for the items to added to the favorites list.
7. In the search results, click the add favorite link under the item to be added.

8. The item Add Favorite box will open, fill in the required fields.
   a. **Item Nickname –** leave the item description or enter a nickname forth item
   b. **Quantity** - Enter a quantity this can be changed with the order is placed.
9. In Step 2 of the Add Favorite box, select the shared favorite folder the item belongs in

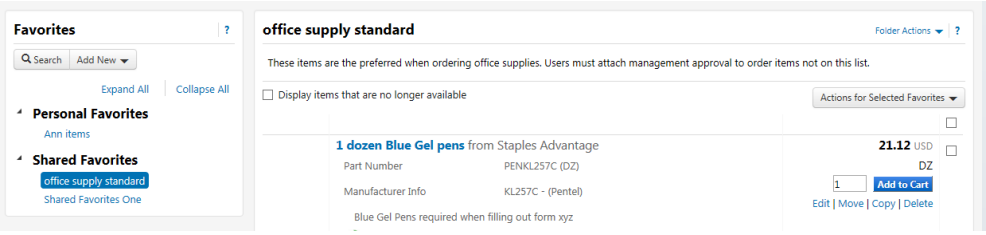


10. Click the Save Changes button.

11. A green message will appear on the top of the screen when the items are saved. Then the items search page will be displayed.
12. Repeat steps 5 to 12 for every item that will be in the favorite's folder.

Using the favorite's folder to place an order

1. Click on the favorites link under the shop and compare bar.



2. Select the Shared Favorite's folder.
3. Then click in the check box on the far right of the item(s).
4. Click the Actions for Selected Favorites and choose Add to Cart.
    a. The item(s) selected will be added to the cart
    b. View the cart
    c. Click on Proceed to Checkout

For further assistance, please contact doawispro@wisconsin.gov