



Managing Favorites

The “Favorites” functionality allows requisitioners to store items that are referenced or ordered on a regular basis. By setting up favorites, less time is spent searching for items that will be ordered again in the future.

Within HACC SupplierConnect, there are two types of favorites:

- **Personal** – personal favorites are those that an individual user identifies for future purchasing. With personal favorites, folders and sub-folders can be created to manage the favorites; users have full control over items in their personal folders.
- **Shared** – shared favorites and folders are set up by administrators, and can be set up for viewing/use for the entire organization or a subset – such as a department, specific users, or a specific role. Shared favorites typically represent frequently ordered products or suggested products for purchase.

Note: SupplierConnect favorites are not the same as “supplier favorites”. Supplier favorites are created and saved on individual supplier sites and are strictly items specific to the supplier. In comparison, SupplierConnect favorites are created at the time a requisitioner “reviews” a cart and may select items to put into a favorites folder that may contain items from multiple suppliers.

The following types of items or requests can be saved as favorites:

- Hosted items
- Punch out items
- Non-Catalog items
- Forms

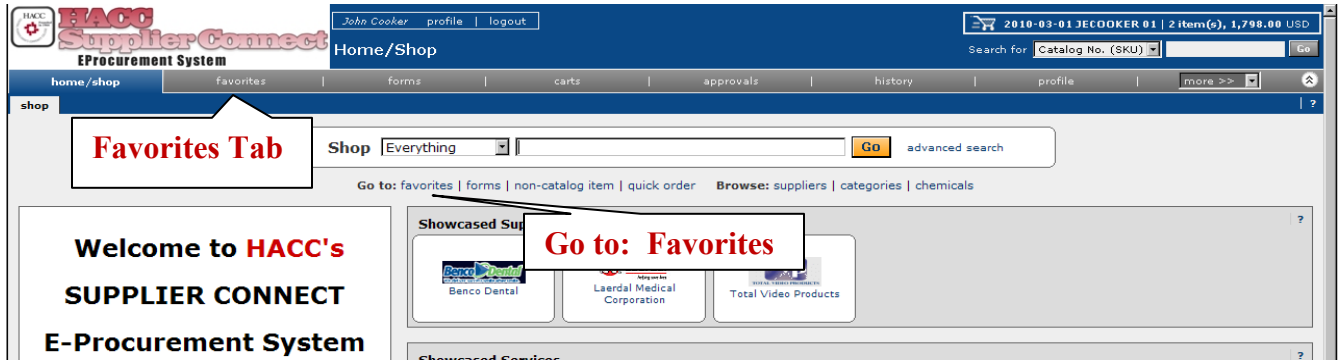
This training guide will cover:

- Accessing Favorites
- Creating Favorite “Folders”
- Adding Favorites to folders
- Moving/Coping Items between folders
- Editing Favorites
- Deleting Favorites
- Adding Favorites to Cart

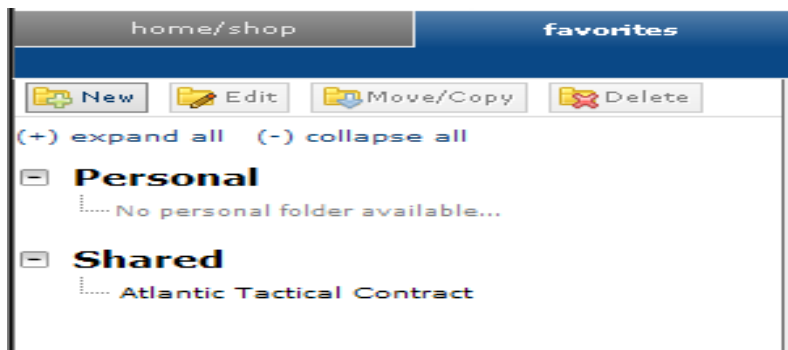
ACCESSING FAVORITES

Once items are added to “Favorites” they can be accessed from one of two places:

- “Favorites” tab accessed via the home page
- Search Tools navigation tab OR from the My Favorites navigation tab.



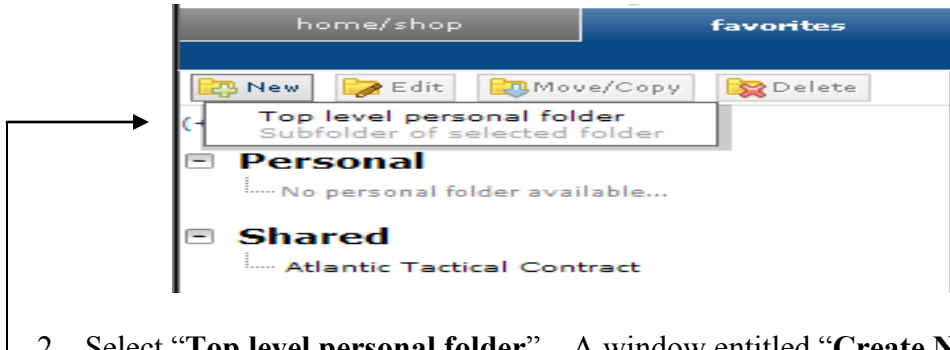
CREATING FAVORITE FOLDERS



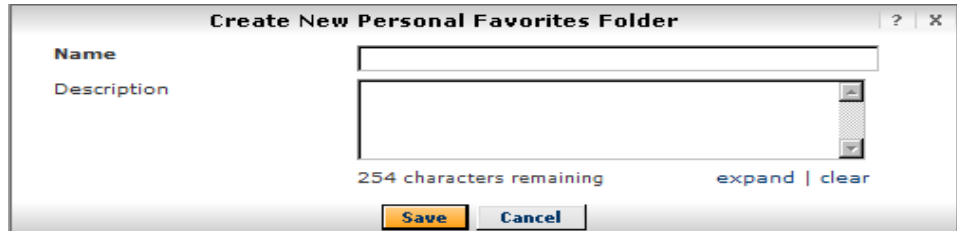
Either of the two access methods above will open the “Favorites” window. Personal and Shared folders are displayed. To begin using “personal” favorites the user must FIRST create a personal “folder”.

Creating Favorite Folders cont'd.

1. Click NEW

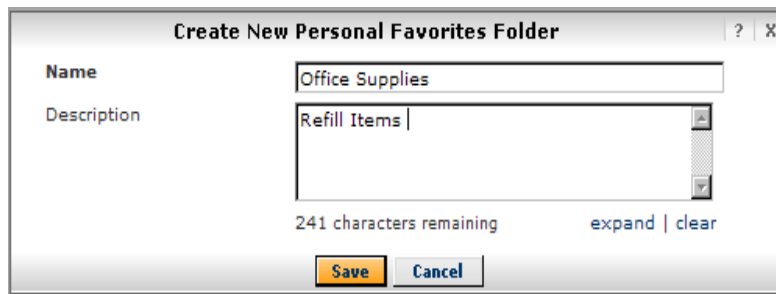


2. Select "Top level personal folder". A window entitled "Create New Personal Favorites Folder" opens.



The dialog box has a title bar with a question mark and close button. It contains two input fields: 'Name' (empty) and 'Description' (empty). Below the description field, it says '254 characters remaining' and 'expand | clear'. At the bottom are 'Save' and 'Cancel' buttons.

3. Enter a Name and Description (example below).



The dialog box is filled with the text 'Office Supplies' in the Name field and 'Refill Items' in the Description field. The character count now shows '241 characters remaining'.

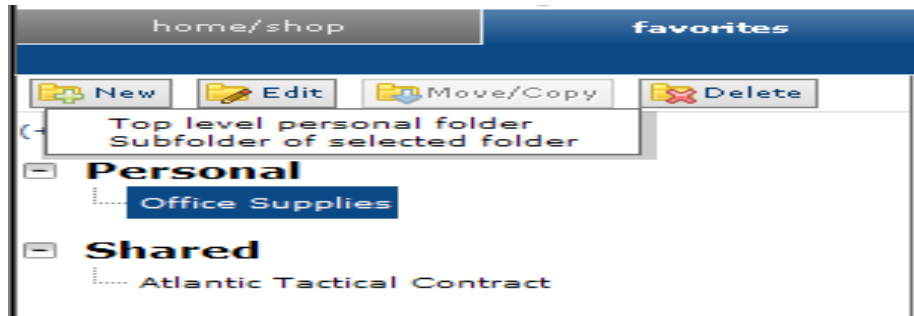
4. A "Personal" folder has been created and is now available to add item to.



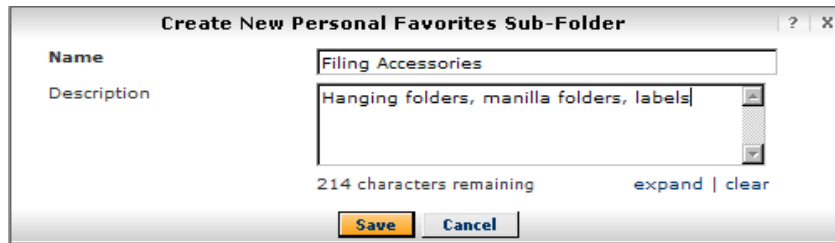
Creating Favorite Folders cont'd.

A “Personal” folder may also have a “sub-folder” to further assist the user to locate saved items. First, create the “Top Level Personal Folder”. The steps are:

1. Highlight the “Top Level Personal Folder”.



2. Click on “NEW” and a second option is now available; “**Sub-folder of Selected Folder**”. Name the “sub-folder” and provide a description. SAVE.



3. In this example, there is now a “Top” level folder called “Office Supplies” and the first “Sub-folder” called “Filing Accessories”. The user can save specific filing accessories in this folder such as hanging folders, manila folders, labels, etc.



ADDING FAVORITES TO FOLDERS-

Favorites can be added from the product search results, from the cart, and when working in forms and the non-catalog item entry screen. Although the “starting point” may be different, the way in which favorites are added is the same.

A. Adding “favorites” from a cart –

1. Click on individual items or the box next to “Ext. Price” which selects the entire order
2. Select from the drop-down menu options, “Add to Favorites”.

2) Select “Add to Favorites”.

1) Select this box for all items or individual boxes below to add items to favorites.

Product Description	Catalog No	Ext. Price
1 Swingline - 5000 Staple Cartridge Chisel Point - 1/4 Leg, 30 Sheets, 5000/Box, Chisel Point	H150050	3.68 USD
2 Stanley Bostitch - Premium B-8 Chisel Point Staples - 1/2 Crown, 1/4 Leg, 30 Sheets, 5000/Box	H1STCRP21	4.73 USD

Supplier subtotal 8.41 USD

Subtotal 8.41
Shipping 0.00
Handling 0.00
Total 8.41 USD

Adding “favorites” from a cart cont’d.

3. Select one of the folders or sub-folders by moving the mouse pointer over the file name and the description will be displayed.

The screenshot shows a dialog box titled "Add To Favorites" with two main sections: "Step 1: Edit Item Details" and "Step 2: Select Destination Folder".

Step 1: Edit Item Details

- Item Nickname: Swingline - 5000 Staple Cartridge Chisel Point - 1/4 Leg, 30 Sheets, 5000/Box, Chisel Point
- Quantity: 1
- from OfficeMax , Catalog No. H150050
- Add Description
- Item Nickname: Stanley Bostitch - Premium B-8 Chisel Point Staples - 1/2 Crown, 1/4 Leg, 30 Sheets, 5000/Bo
- Quantity: 1
- from OfficeMax , Catalog No. H1STCRP21151/4
- Add Description

Step 2: Select Destination Folder

- New
- Personal
 - Office Supplies
 - Desk Top Accessories
 - Filing Acces
 - Staplers, Scotch tape, Sticky Notes
- Shared
 - No shared folder available...

At the bottom are "Submit" and "Cancel" buttons.

Annotations:

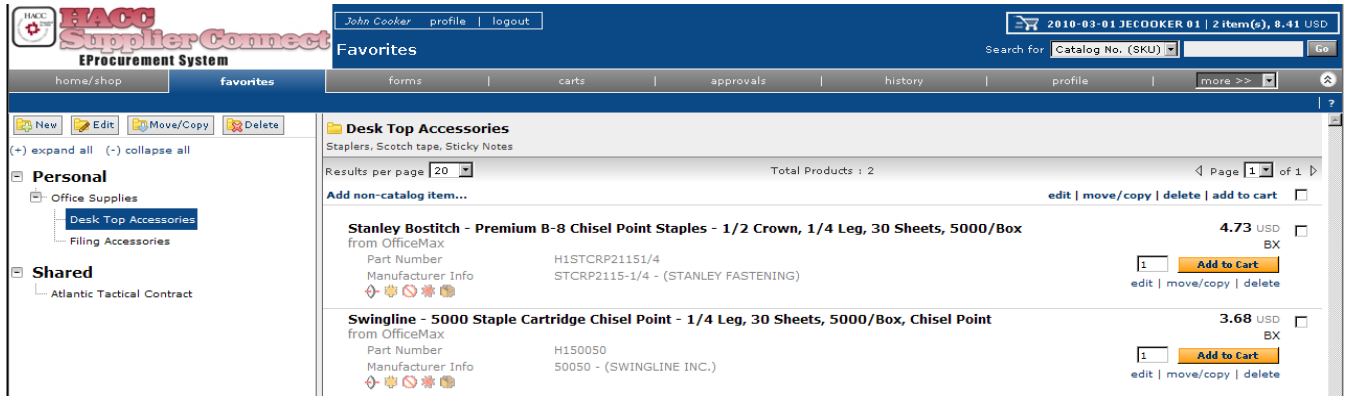
- A red box on the right says "Items Selected to be added to Favorites." with arrows pointing to the quantity input fields.
- A red box in the center says "Sub-folder with mouse pointer to display the description. Click on the file and the items are added." with an arrow pointing to the "Staplers, Scotch tape, Sticky Notes" folder.

4. Click “Submit” and a confirmation window indicates the item(s) were added to my “favorites”.

The screenshot shows a confirmation message in a dialog box titled "Add To Favorites". The message reads: "Product has been successfully added to Favorites". At the bottom is a "Close" button.

Adding “favorites” from a cart cont’d.

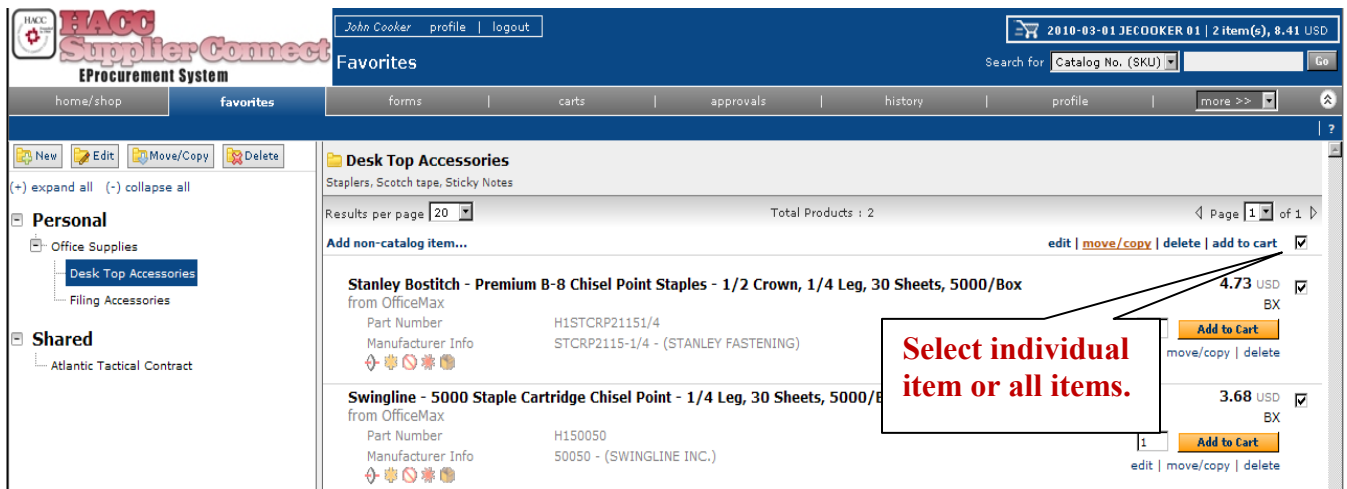
5. Click on the “Favorites” tab and the items in the folder will be shown.



MOVING/COPYING ITEMS BETWEEN FOLDERS-

SupplierConnect allows you to move items and forms from one folder to another and copy items from one folder to another. These features may be useful if you create a sub-folder for a specific type of items and need to move favorites added earlier.

1. Select the appropriate folder from the left pane, and locate the item(s) on the right pane.
2. To move or copy one item to a different folder, click the move/copy link directly under Add to Cart.



Moving/Copying Items Between Folders cont'd.

3. Select the folder to move or copy the item to, then click the appropriate button: move or copy. Move will take the item from the current folder and move it to the new one. Copy will make a copy and leave the existing item in the original folder.
4. After selecting to move or copy the item, a confirmation window displays.
5. Click **Close**. The item is now moved or copied.

EDITING FAVORITES-

After adding a favorites item or form to a folder, you may need to update the item, including the name and quantity.

1. Open the “**Favorites**” window.
2. Select the appropriate folder from the left pane, and locate the item(s) on the right pane.
3. Click the “edit” link directly under “**Add to Cart**”.
4. Make any necessary changes to the item, and click **SAVE**.

DELETING FAVORITES-

In Favorites, **items or folders** can be deleted as necessary. Sometimes items are no longer available, regularly ordered items change, or an incorrect item may have been added to Favorites.

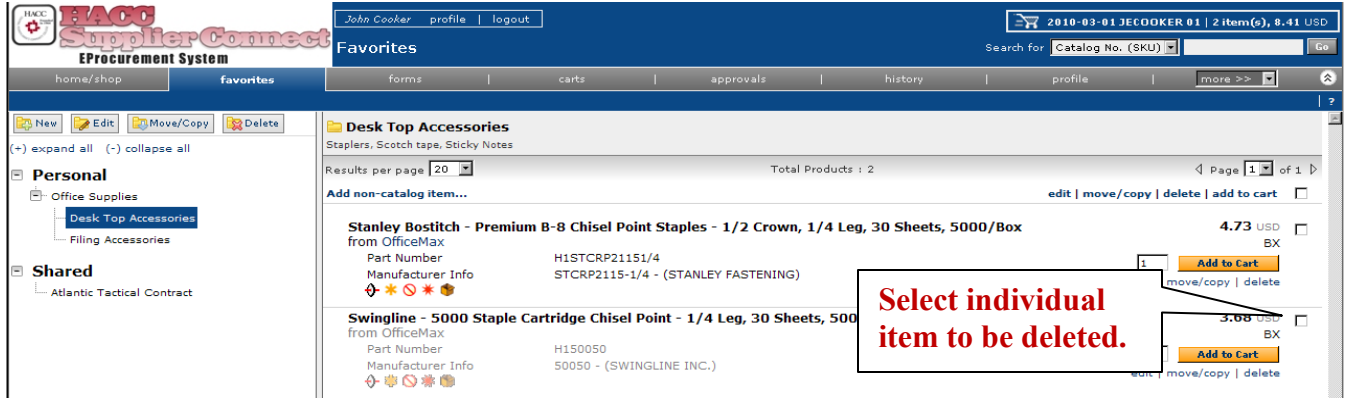
1. Open the “Favorites” window



2. Highlight the “**folder**” to be deleted and click on delete.

Deleting Favorites cont'd-

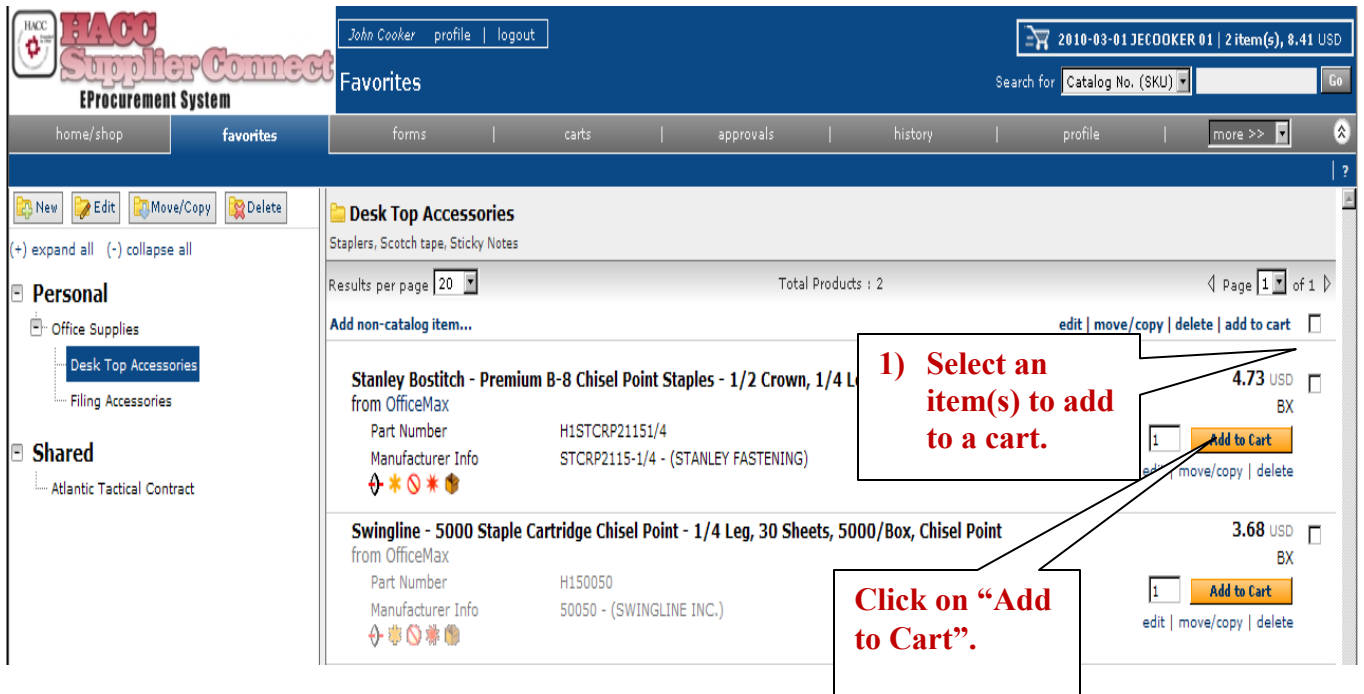
3. To delete “individual items in a folder”



ADDING FAVORITES TO CART

The “favorites” functionality allows requisitioners to store items that are referenced or ordered on a regular basis. Creating a cart from “Favorites” is accomplished by following these steps:

1. Open up the “Favorites” window and locate an item to add to a cart.



Adding Favorites to a Cart cont'd.

2. Select an item to add to a cart. Click on “Add to Cart”.
3. The favorites window will add the “1 item(s) added, view cart”.

The screenshot shows the 'Favorites' section of the HACC Supplier Connect EProcurement System. The user is logged in as John Cooker. The page displays a list of items under the category 'Desk Top Accessories'. Two items are listed:

- Stanley Bostitch - Premium B-8 Chisel Point Staples - 1/2 Crown, 1/4 Leg, 30 Sheets, 5000/Box** (4.73 USD BX). This item is selected, and a red callout box indicates 'Item Added, View Cart'. A callout box also points to the 'Supplier' information for OfficeMax.
- Swingline - 5000 Staple Cartridge Chisel Point - 1/4 Leg, 30 Sheets, 5000/Box, Chisel Point** (3.68 USD BX).

Each item has an 'Add to Cart' button and options to 'edit', 'move/copy', or 'delete'. The page also shows a search bar and navigation tabs for 'home/shop', 'favorites', 'forms', 'carts', 'approvals', 'history', and 'profile'.

4. A new cart for the supplier, i.e. **OfficeMax**, has been created and now must be completed by the user like any punch out, hosted or non-catalog order.

The screenshot shows the 'Cart - Draft Requisition' page in the HACC Supplier Connect EProcurement System. The user is logged in as John Cooker. The page displays a 'Create Cart' form with a 'Required field: Commodity Code (Line 1)' error message. The 'Supplier / Line Item Details' section shows the selected item from the previous screenshot, 'Stanley Bostitch - Premium B-8 Chisel Point Staples - 1/2 Crown, 1/4 Leg, 30 Sheets, 5000/Box', with a unit price of 4.73 USD. The total price is 4.73 USD.

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 Stanley Bostitch - Premium B-8 Chisel Point Staples - 1/2 Crown, 1/4 Leg, 30 Sheets, 5000/Box	H1STCRP21151/4	BX	4.73	1 BX	4.73 USD
Supplier subtotal					4.73 USD
Subtotal					4.73
Shipping					0.00
Handling					0.00
Total					4.73 USD

The page also shows a 'Create Cart' form with fields for 'Cart Name', 'Description', and 'Priority'. The 'Cart Name' field contains '2010-03-01 JECOOKER 01'. The 'Priority' field is set to 'Normal'. The 'Supplier' field is set to 'OfficeMax'. The 'PO Type' field is empty. The 'Add Non-Catalog Item' button is visible. The 'Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.' message is also present.