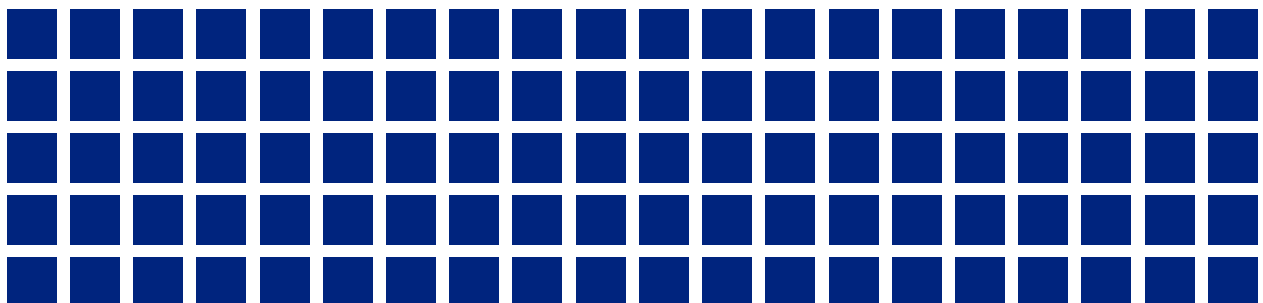




Tigerbuy Training: Managing Favorites

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Managing Favorites

Using the **Favorites** functionality, items that are referenced or ordered on a regular basis can be stored for easy access. Within Tigerbuy, there are two types of Favorites items: Personal Favorites and Organization Favorites.

- Personal favorites are those that you identify. With personal favorites, folders and sub-folders can be created to manage these favorites; users have full control over items in their personal folders.
- Organization favorites and folders are defined by Procurement Services. These items typically represent frequently ordered products or suggested products for purchase. Requisitioners cannot modify Organization Favorites.

The Favorites navigation menu is used to create and define company and personal Favorites items and folders. Items can be moved and copied between folders. Current folders may also be edited and deleted. Favorite items can be added through search results and the checkout screens. Once items are added to your favorites they can be accessed from either the Favorites tab on the Home screen or from the My Favorites screen.

Managing Favorites Folders and Subfolders

Favorites support the traditional folder/subfolder structure. Any folder structure can be created, in terms of adding new folders (if any) and nesting subfolders within them as appropriate.

Some ideas for Favorites folder structures are:

- Products from a single supplier
- Products in a single commodity
- Products for a single department
- Top number of products ordered
- Products for a particular experiment
- Products needed for new hires
- Products ordered every week
- Internal inventory specials

Select **My Favorites** in the navigation menu. Favorites defaults to the Active Folders tab; therefore, to add or edit folders select the **Edit Folders** tab. Observe the Favorites Legend link in the upper right for a visual reference of commonly used icons.

In the row for the My Favorites main folder, click the **New Sub Folder** button to create a new folder. The Subfolder popup opens. Give the new folder a name and click **Save**. To nest additional folders within folders simply click the **New Sub Folder** button in the new folder's row to nest a folder within the new folder. Repeat the process as necessary.

For personal folders you also have various folder management options, such as:

- Copying a folder to another folder
- Moving a folder
- Editing a folders and products
- Deleting folders and products

Adding Items to My Favorites

Hosted catalog items can be added to your Favorites through a product search and from your shopping cart. Since Punch-out catalog items are accessed from the vendor's website, store your favorites within the Punch-out catalog, if available.

Adding Items through Product Search

To add an item or items from a product search you will first need to locate the item you plan to order. Enter your search terms in the text field and click on the **Include similar terms** checkbox to expand the search results. For more specific search options click on the link **advanced search options...** When ready, click the **Search** button to locate the items matching your search criteria. The page will refresh upon which you may scroll down to view the search results.

Locate the item you would like to add to your favorites and click on the selection box located on the right of the item line. Click on the drop-down box and select the option **Add to Favorites**, then click on the **Go** button to open the Add to Favorites popup.

Determine what folder the item or items will go into, edit the description if you wish, and enter a default quantity. Click on the **Submit** button to add the product to your Favorites. Click on the **Close** button to confirm and complete the process. The product is now saved to your Favorites.

Adding Items from Your Shopping Cart

To add an item to your Favorites from your shopping cart first shop for a few items and add them to your cart. This includes items you may purchase regularly from hosted catalogs. Access your cart by clicking on the shopping cart link in the upper right corner of the screen. For Punch-out catalog suppliers this selected action cannot be performed because the supplier does not support reordering items from previous punch-out sessions. You need to initiate a new punch-out session from the search tab. The Edit Cart screen displays your active cart where you have the ability to:

- Update the product quantity
- Add items to favorites
- Remove selected items or all items
- Move items to a new cart
- Add items to a draft cart or pending PR/PO
- View line item history

To add an item to your favorites, select the item by clicking on the selection box located on the right of the item line. Select **Add to Favorites** from the drop-down menu and click on the **Go** button.

From here the steps are the same as how an item was previously added through the product search. Determine what folder the item will go into, and edit the description and change the quantity if you wish. Click on the **Submit** button to add the product to your Favorites. Click on the **Close** button to confirm and complete the process. The product is now saved to your Favorites.

Ordering Items from Your Favorites

Once items are added to Favorites they can be added to your shopping cart from two places:

- from the Favorites tab accessed via the home page or Search Tools navigation tab, or
- from the My Favorites navigation tab.

Adding Items from the Favorites Tab on the Home Screen

To add items from the Favorites tab, navigate to the **Home** screen. Select the **Favorites** tab. From the **folder** drop-down, select the folder from which to select products to add to the cart.

After the folder is selected the Favorite items in the folder are displayed. Select the item or items to add to the cart. Click on a single product to highlight it to add to the cart, or to select multiple items you can:

- Press Shift on the keyboard and then select multiple items in a contiguous list, or
- Press Ctrl (Windows) or Command (Mac) and then select multiple items in a non-contiguous list.

Click on the **Add to Active Cart** button when you are finished to add the Favorite or Favorites to the cart.

Adding Items from the My Favorites Screen on the Navigation Menu

To add items from the Favorites screen navigate to the My Favorites screen. The Active Folders tab on this page is selected by default. Browse through the list(s) of Folders/Product Names. You can click on any closed folder to expand it and show its contents, and click on any open folder to collapse it and hide its contents.

To view additional product detail, select the product's **Select** checkbox and click on the **Details** button. For Hosted catalog products you can click on the product name to view additional product information.

To add one or more items to the cart, edit the value in a product's **Quantity** field as necessary. Select the product's **Select** checkbox and click on the **Add to Active Cart** button.

To add the entire contents of a folder to the cart, edit the **Quantity** fields as necessary for any of the individual products within a folder. Select the product's **Select** checkbox next to that folder—this will select the checkbox next to all items in that folder—and select **Add to Active Cart**. This function will work with multiple folders or items.

When you are ready to complete the ordering process, select your **active cart** in the upper right corner of the screen and make any necessary updates to the items in your cart. Click on the **Review** option in the workflow to review your requisition details. When you are ready, place your order.