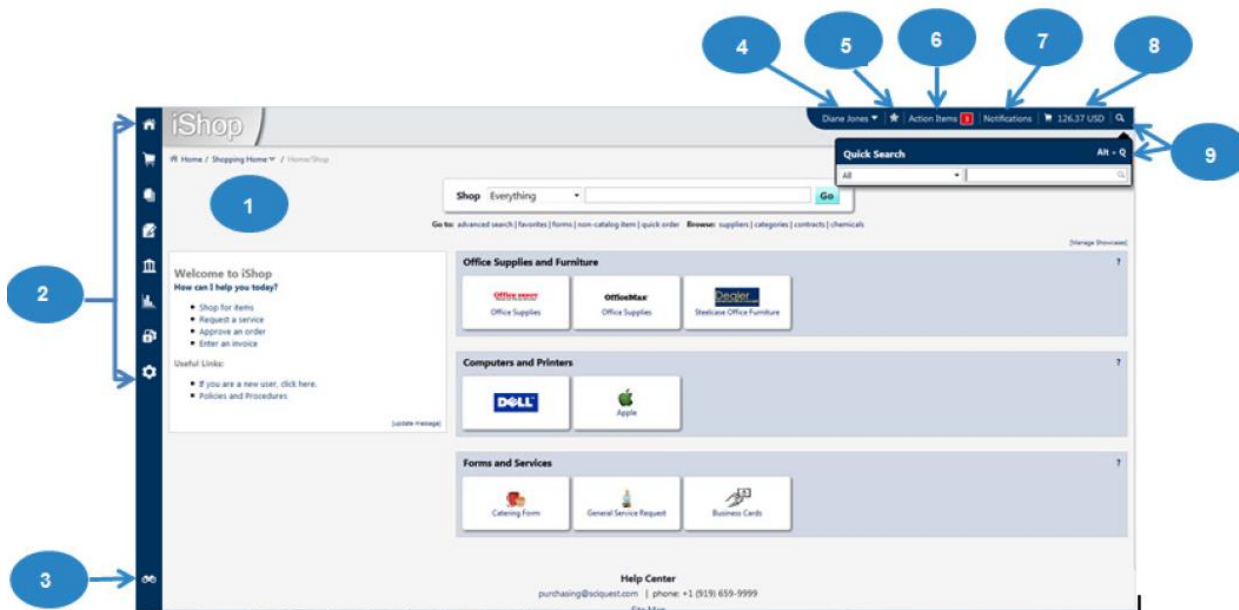# Navigating in the Marketplace (after login)

1. **Shopping Home** – Default landing page
2. **Main Menu Options** - The options displayed are based on user roles assigned from ISRS security. Each menu contains sub-menu options.
3. **Menu Search** – This feature allows you to search for specific screens and functions in the application
4. **User Menu –** Access and update your user profile by selecting your name
5. **Bookmarks –** Create and access bookmarks for commonly used pages
6. **Action Items –** Action items are tasks that require action on your part. Action items are grouped together by task. Click on the task to take you to the appropriate area of the **Marketplace**.
7. **Notifications –** Notifications are designed to alert you when an activity has taken place or something requires your attention.
8. **Cart Preview –** Cart preview allows you to get a quick view of the active shopping cart.
9. **Quick Search –** This allows a variety of searches to be performed from anywhere

Setup defaults and favorites

To start, select the dropdown icon next to your name in the top right of the **Marketplace**. Once selected, chose 'View my Profile'.
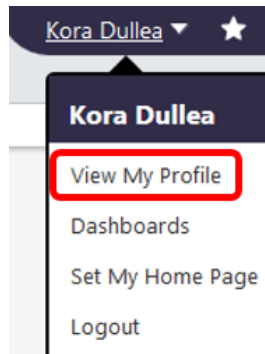
Default Addresses

When submitting a requisition, you must enter a ship and bill to address every time. By setting these defaults, the system will remember them save you some time! Follow these instructions to setup your default addresses:

After selecting 'View my Profile' select 'Default User Settings' then 'Default Addresses'.
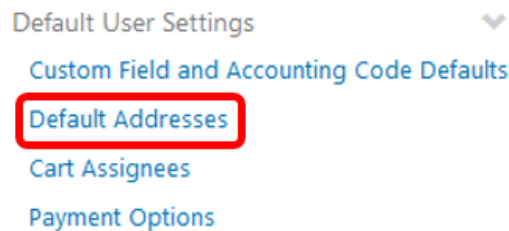
Perform these steps for **both** the 'Ship to' and 'Bill to' address:

1. Chose the button 'Select Addresses for Profile'

2. Select templates of 'Metro State – Central Receiving' for your ship to address **and** 'Metro State – AP' as your bill to address:

Select Address Template

Select Address Template   Metro State - AP ▾

3. Make sure the default box is checked for both and shipping, then click 'Save'. Your name will default in the ship to address so Central Receiving knows who to deliver it to!

Edit Selected Address   ?

Nickname	Metro State - Central Receivi
Default	☑
Current Default Address	---

ADDRESS

Attn:	Kora Dullea
Room/Bldg	Rm L3SJ St Johns Hall
Address Line 1	Metro State University
Address Line 2	700 E. Seventh St.
City	St. Paul
State	MN
Zip Code	55106
Country	United States

Save

Accounting Defaults and Favorites

Setting up your cost centers as a favorite default will save you a lot of time when ordering. They appear on the requisition for you to select from a dropdown instead of entering it every time. To setup your cost centers as a favorite default follow these instructions:

1. After selecting 'View my Profile' select 'Default User Settings' then 'Custom Field and Accounting Code Defaults'.

Default User Settings   ⌄
Custom Field and Accounting Code Defaults
Default Addresses
Cart Assignees
Payment Options

2. Select the 'Code Favorites' tab

Custom Field and Accounting Code Defaults

Header (int.) Vendor Codes **Code Favorites**

3. Select the first 'Add' button

4. Choose a 'Nickname' that will assist you in knowing what cost center to use – we also recommend entering the cost center number as part of the name. For example 'FinMgmt 217050'.

5. Once you enter a Nickname, under the Cost Center, choose 'Select from all values'

6. Search for your cost center by entering the cost center number in the 'Value' field, then select 'Search'

7. Press 'Select' when your cost center appears (note: all cost center numbers include a 3 digit code tied to your college/university)

8. After step #7, you will be brought back to the previous page. Select the current Fiscal Year from the drop down box. For example, 2017.

9. The finished product should look like this:

Before saving -

Accounting Codes   ? X

Nickname [FinMgmt 217050]   ☐ Default

RC_ID	Cost Center	Grant Nbr	Project Funding Nbr	Fiscal Year	Bank	add split
[0076]	[217050 - 076]	*no value*	*no value*	[2017 ▾]	T	
Select from profile values...	Select from all values...	Clear selected value...	Clear selected value...		Clear selected value...	
Select from all values...						

recalculate / validate values

[Save] [Cancel]

After saving –

Accounting Codes   ?

FinMgmt 217050   [Edit] [Delete]

RC_ID	Cost Center	Grant Nbr	Project Funding Nbr	Fiscal Year	Bank
0076	217050 - 076	*no value*	*no value*	2017	T
Metro SU	FINANCIAL MANAGEMENT			2017	Treasury Account

Additional Notes:

- You can also check the default box to have one stored as your default.

- You can save a split as your default, meaning you can set it up using multiple cost centers.