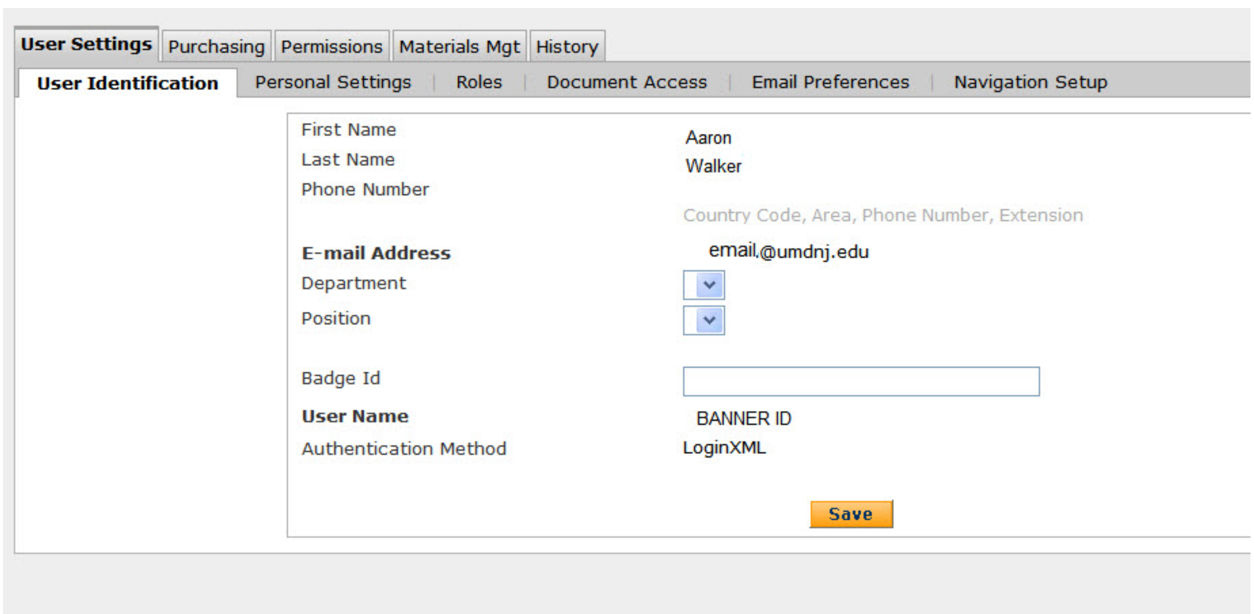
Setting up your Market Place profile

In this tab you will be able to set up your personal information, email permissions (notifications) as well as accounting, delivery and shipping information. This information is very important to all users for the system. This will allow the transaction to process easier through the system without you setting this up each time. If the Name, Phone and e-mail is not filled in then the transaction will not work.

1. Select the ***profile*** link in the upper left hand corner next to the UMDNJ logo

You will now be in *Profile > User Settings > User Identification*
On this tab you can not directly edit or change anything. If your phone number is incorrect or missing, please upate the on-line directory in my.UMDNJ.edu. In the *User Name* area this is your banner security username.



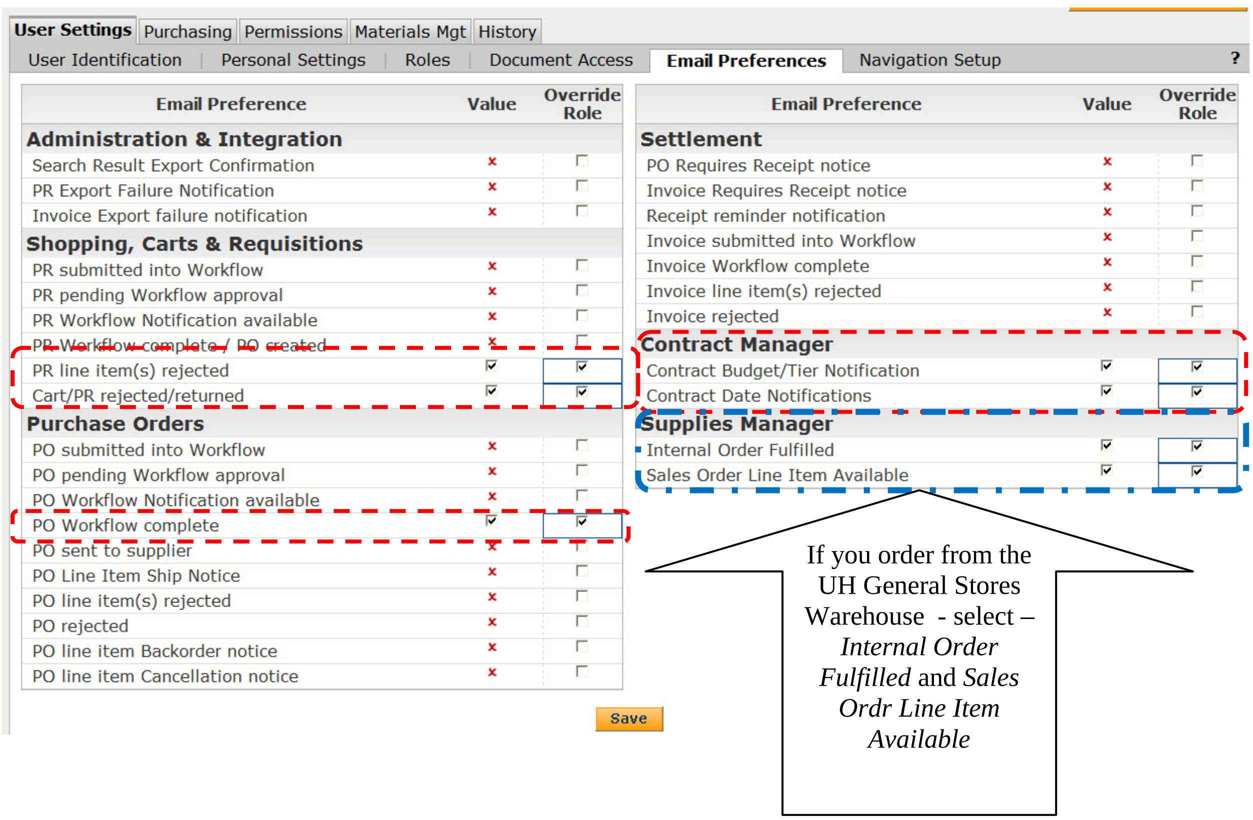
1. Select the sub-tab *Email Preferences* under the *User Settings* tab.

2. Select the following notification marked in the image.

   NOTE: Required to obtain Requisition and PO information
   - ✓ PR line item rejected
   - ✓ Cart/PR rejected/returned
   - ✓ PO Workflow complete (this will give you the UMDNJ PO number)

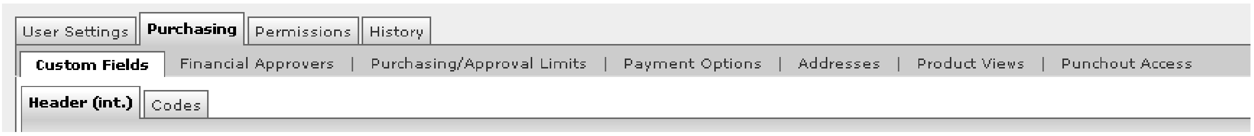
   NOTE: Required for the form Standing Order - Goods (MarketPlace).
   - ✓ Contract Budget / Tier Notification
   - ✓ Contract Date Notification

3. Select **Save**

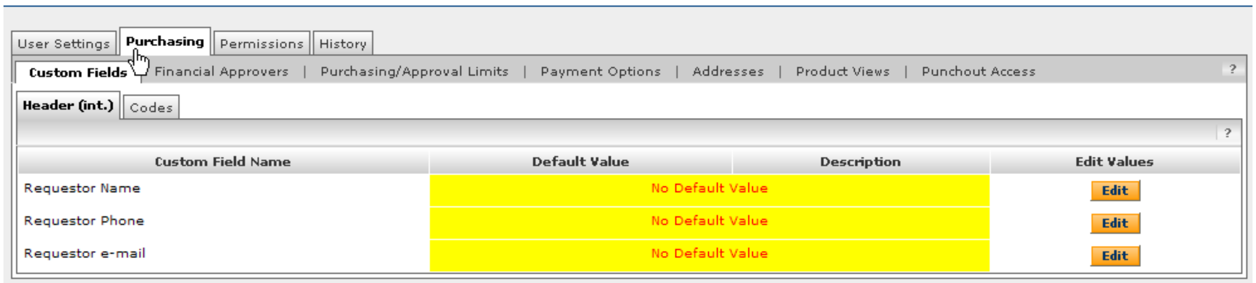


Select the ***Purchasing*** tab

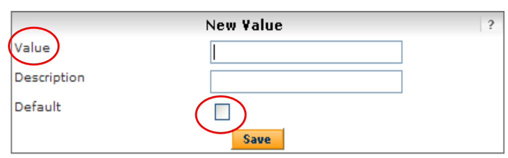
You will be on the *Custom Fields – Header (int.)* sections. The *Header (int.)* and *Codes* are required sections that have to be filled in.

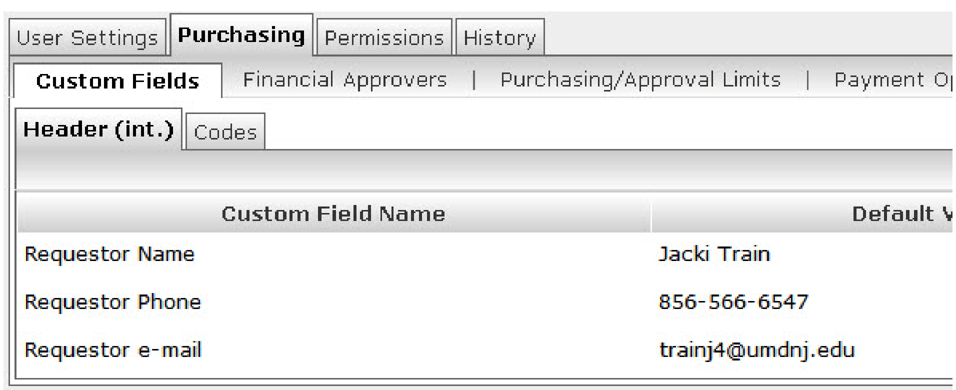


Follow the steps below to fill in the Requestor Name, Phone and e-mail.



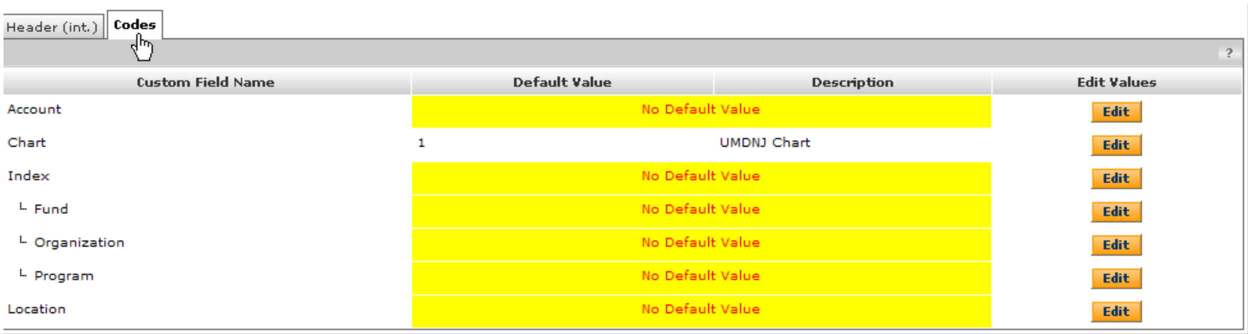
1. Select **Edit**
2. Select **Create New Value**
3. Type the appropriate information into the **Value** field
4. Select the default box
5. Select **Save**
6. Select **Close**
7. Repeat steps 1 – 6 for Phone and e-mail.



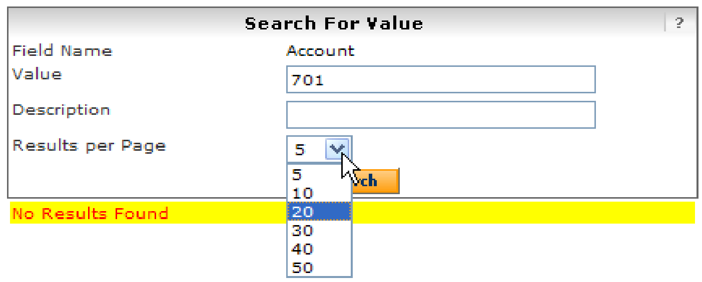


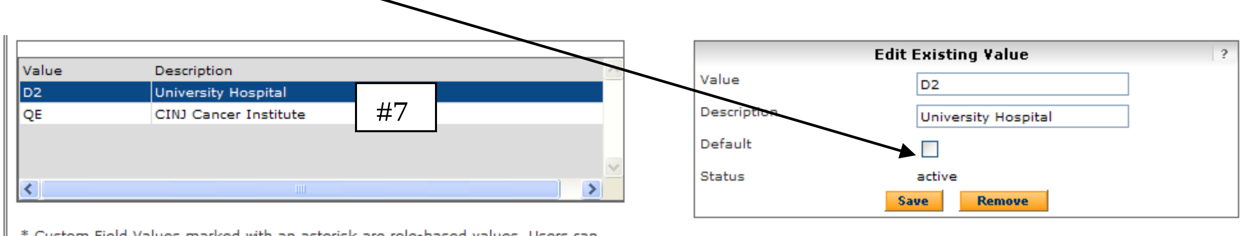
Note: Please make sure that the phone number includes the area code.

Select the *Codes* sub-tab, follow the steps below to populate the Account, Index and Location information



1. Select **Edit**
2. Select **Create New Value**
3. Search for the appropriate information by putting the information in the Value field.
    a. You can change the number of items that will display for your search
4. Select **Search**
5. Select the appropriate items
6. Select **Add Values**
    a. You will follow steps 5 and 6 for each result page from your search. If other information is desired then select **Back to Search** to repeat steps 3-6.
7. Then select the value that should be set as your default value for that section.
8. Select the Default field

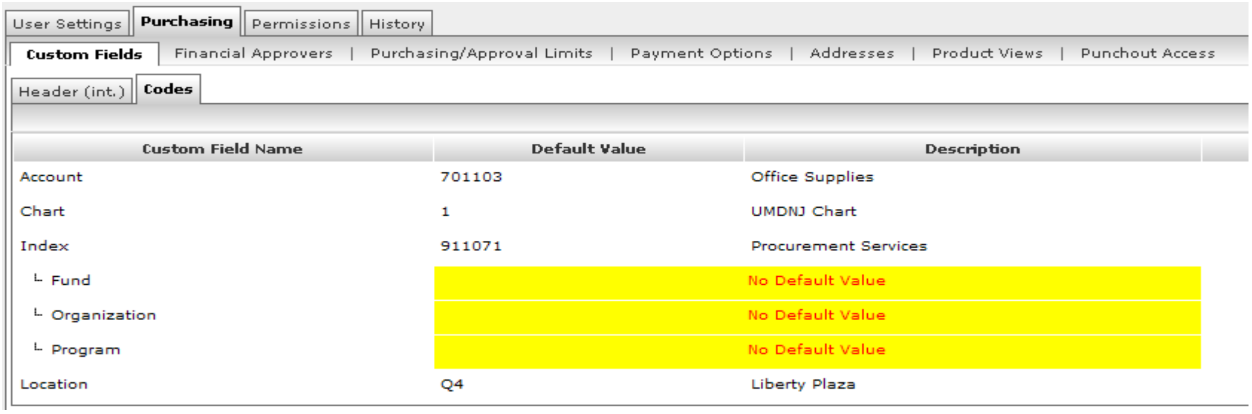




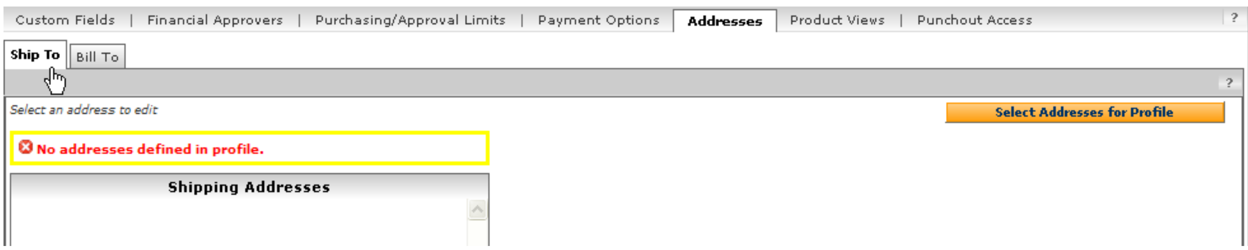
9. Select **Save**
10. Select **Close**

Note: Do not default information into Account or Index if you use multiple numbers. You will still have the information in the drop down list to use.

Note: Account Codes start with 701 (general), 702 (services), 703 (maintenance/lease), only use a 706 account code if the item is tangible and your order is $5000 or more.



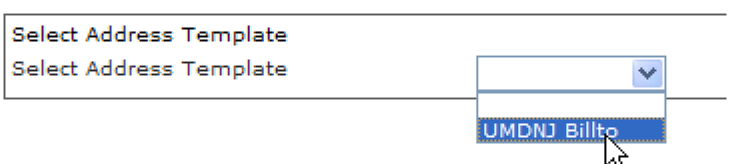
Select the *Addresses* sub-tab (under the Purchasing main tab) to populate the Ship To and Bill To



1. Select **Select Addresses for Profile**
2. Type the Ship To code in the Nick Name field
3. Select **Search**
4. Select the appropriate address.
5. Select **Save**
6. Repeat steps 1- 5 until you have selected all of the Ship To codes that you need. The first code that you select will be your default location. You may change this if needed.

Select the *Bill To* sub-tab

1. Select **Select Addresses for Profile**
2. Select the drop down to pick the only address available.



3. Select **Save**

Note: Location Code and Ship To Code are giving out in training. Please contact isttrain@umdnj.edu for any questions about the codes. Contact your department about index numbers.

This completes Setting Up your Profile.