

## Setting up your Market Place profile

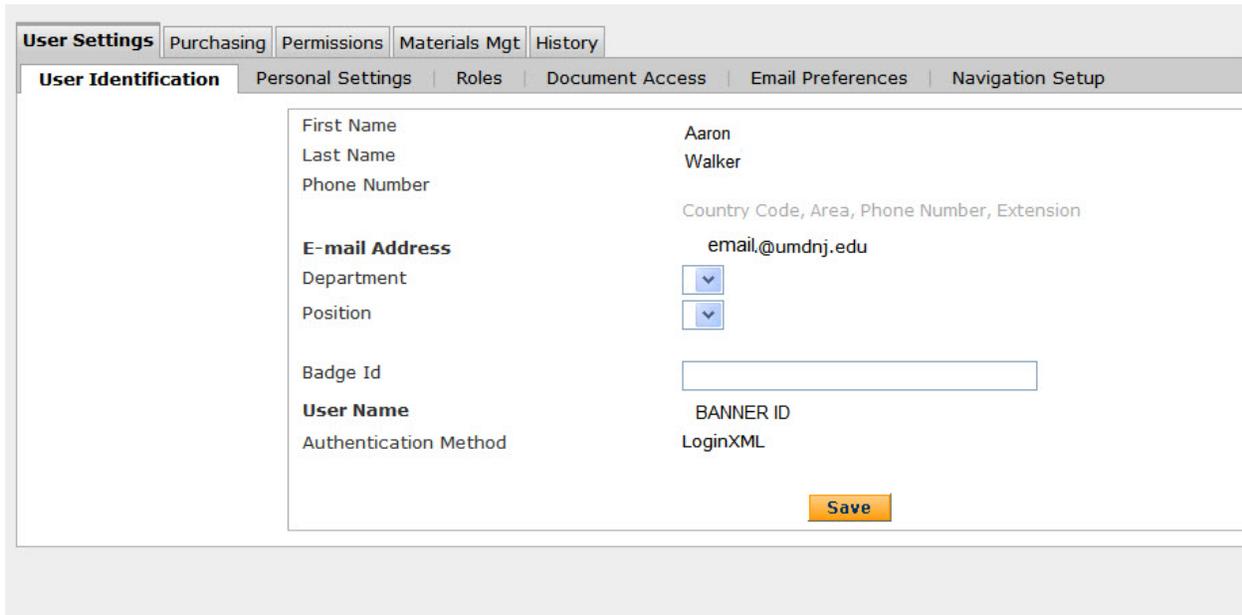
In this tab you will be able to set up your personal information, email permissions (notifications) as well as accounting, delivery and shipping information. This information is very important to all users for the system. This will allow the transaction to process easier through the system without you 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 update the on-line directory in my.UMDNJ.edu. In the *User Name* area this is your banner security username.



User Settings	
User Identification	
First Name	Aaron
Last Name	Walker
Phone Number	
	Country Code, Area, Phone Number, Extension
<b>E-mail Address</b>	email@umdnj.edu
Department	<input type="button" value="v"/>
Position	<input type="button" value="v"/>
Badge Id	<input type="text"/>
<b>User Name</b>	BANNER ID
Authentication Method	LoginXML
<input type="button" value="Save"/>	

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 

Email Preference	Value	Override Role
<b>Administration &amp; Integration</b>		
Search Result Export Confirmation	x	<input type="checkbox"/>
PR Export Failure Notification	x	<input type="checkbox"/>
Invoice Export failure notification	x	<input type="checkbox"/>
<b>Shopping, Carts &amp; Requisitions</b>		
PR submitted into Workflow	x	<input type="checkbox"/>
PR pending Workflow approval	x	<input type="checkbox"/>
PR Workflow Notification available	x	<input type="checkbox"/>
PR Workflow complete / PO created	x	<input type="checkbox"/>
PR line item(s) rejected	✓	<input checked="" type="checkbox"/>
Cart/PR rejected/returned	✓	<input checked="" type="checkbox"/>
<b>Purchase Orders</b>		
PO submitted into Workflow	x	<input type="checkbox"/>
PO pending Workflow approval	x	<input type="checkbox"/>
PO Workflow Notification available	x	<input type="checkbox"/>
PO Workflow complete	✓	<input checked="" type="checkbox"/>
PO sent to supplier	x	<input type="checkbox"/>
PO Line Item Ship Notice	x	<input type="checkbox"/>
PO line item(s) rejected	x	<input type="checkbox"/>
PO rejected	x	<input type="checkbox"/>
PO line item Backorder notice	x	<input type="checkbox"/>
PO line item Cancellation notice	x	<input type="checkbox"/>

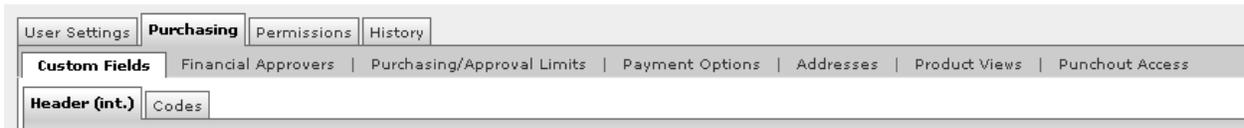
  

Email Preference	Value	Override Role
<b>Settlement</b>		
PO Requires Receipt notice	x	<input type="checkbox"/>
Invoice Requires Receipt notice	x	<input type="checkbox"/>
Receipt reminder notification	x	<input type="checkbox"/>
Invoice submitted into Workflow	x	<input type="checkbox"/>
Invoice Workflow complete	x	<input type="checkbox"/>
Invoice line item(s) rejected	x	<input type="checkbox"/>
Invoice rejected	x	<input type="checkbox"/>
<b>Contract Manager</b>		
Contract Budget/Tier Notification	✓	<input checked="" type="checkbox"/>
Contract Date Notifications	✓	<input checked="" type="checkbox"/>
<b>Supplies Manager</b>		
Internal Order Fulfilled	✓	<input checked="" type="checkbox"/>
Sales Order Line Item Available	✓	<input checked="" type="checkbox"/>

If you order from the UH General Stores Warehouse - select -  
*Internal Order Fulfilled and Sales Ordr Line Item Available*

Select the **Purchasing** tab

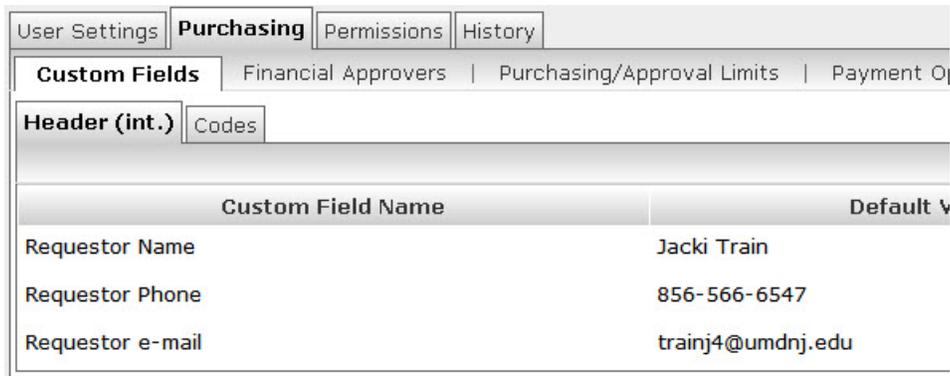
You will be on the *Custom Fields – Header (int.)* sections. The *Header (int.)* and *Codes* are required sections that have to be filled in.



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

Custom Field Name	Default Value	Description	Edit Values
Account	No Default Value		<a href="#">Edit</a>
Chart	1	UMDNJ Chart	<a href="#">Edit</a>
Index	No Default Value		<a href="#">Edit</a>
↳ Fund	No Default Value		<a href="#">Edit</a>
↳ Organization	No Default Value		<a href="#">Edit</a>
↳ Program	No Default Value		<a href="#">Edit</a>
Location	No Default Value		<a href="#">Edit</a>

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

Value	Description
D2	University Hospital
QE	CINJ Cancer Institute

\* Custom Field Values marked with an asterisk are role-based values. Users can

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.

User Settings			
Purchasing			
Permissions			
History			
Custom Fields			
Financial Approvers			
Purchasing/Approval Limits			
Payment Options			
Addresses			
Product Views			
Punchout Access			
Header (int.)			
Codes			
Custom Field Name	Default Value	Description	
Account	701103	Office Supplies	
Chart	1	UMDNJ Chart	
Index	911071	Procurement Services	
L Fund		No Default Value	
L Organization		No Default Value	
L Program		No Default Value	
Location	Q4	Liberty Plaza	

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

1. Select
2. Type the Ship To code in the Nick Name field
3. Select
4. Select the appropriate address.
5. Select
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
2. Select the drop down to pick the only address available.

3. Select

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

**This completes Setting Up your Profile.**